

# **SME test Requests and Rosters**

This page is IN PROGRESS

SIS-168858

LCP-57297

**NEW** 

2411

When to use Requests and Rosters | Where do I?... | Requests and Rosters Navigation | Manage Requests and Rosters from the Student View | Manage Requests and Rosters from the Courses View | Additional Information for Requests and Rosters

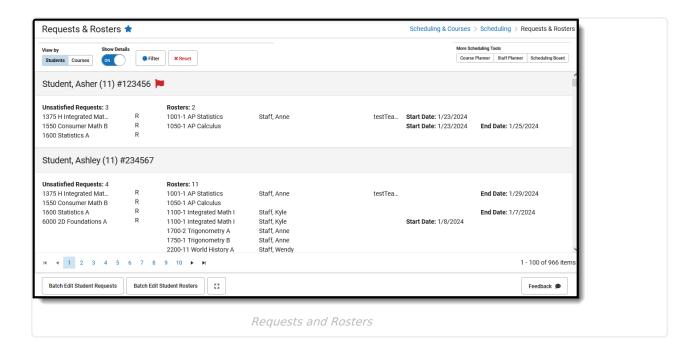
Tool Search: Requests & Rosters

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 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 from 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.

When using Requests and Rosters to perform tasks, ask what needs to be done. First, do you want to work with students or courses? Do you want to modify requests for students or alter rosters (schedules) for students? Do you want to modify requests for courses or alter rosters for course sections?





**Read** - Access Requests & Rosters, select different views, filter display settings, open side panels.

**Write** - Add and remove student requests, change request types; add and remove student and course rosters.

Add - N/A

Delete - N/A

Additional subrights are also necessary. See the Tool Rights section below for more information.

For more information about Tool Rights and how they function, see the Tool Rights article.

Requests and Rosters eliminates the need for the following tools that will be removed in the Campus.2435 Release (August 2024).

- Section Roster Batch Edit
- Request Wizard
- Roster Copy
- Manual Roster Builder
- Section Roster Setup

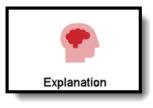
Over the last few years, new scheduling tools have been made available that streamline the scheduling process. See the What's New in Scheduling article for more information.

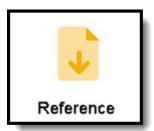


Submit feedback for Request and Rosters by clicking the Feedback button in the bottom right hand corner. This takes you to the Campus Community Requests and Rosters forum topic where you can add your suggestions for this new tool.









Field Descriptions

Where do I...? Batch Edit Course

Requests Batch Edit Course

Rosters Batch Edit Student Requests

Batch Edit Student

Rosters

**Update Course** Other Scheduling tools When to Use Sections to modify

start and end dates

Create course requests

Copy rosters **Build rosters** 

Copy students from

other sections

# When to use Requests and Rosters

Requests and Rosters uses the calendar selected in the Context switcher to apply updates to student schedules and section rosters. Pay close attention to which calendar is selected and which trial is active in that selected calendar.

Use Requests and Rosters:

- AFTER calendars for the next school year are created.
- AFTER rolling student enrollments forward to the next school year.
- IN BETWEEN using the Scheduling Board to build courses.
- BEFORE using the Course Planner to plan the total number of courses and sections.
- IN BETWEEN using Scheduling Board and other scheduling tools to complete the scheduling process.

Depending on what your school's process is for the Scheduling Season, Requests and Rosters can be accessed several times as you complete the course placement and section building for the school. For example, after creating calendars for the next school year and after rolling enrollments into that calendar:

- 1. Use Requests and Rosters to add requests for seniors into their Senior Seminar or other singleton course.
- 2. Open course registration up to the entire high school.
- 3. Schedule the students who are in Band and Choir.



- 4. Use the Scheduling Board to build and load the Music Department.
- 5. Use Requests and Rosters to add the seniors to their other courses.
- 6. Etc.

# Where do I?...

The following table lists where these tasks were performed previously and how the same tasks are accomplished in Requests and Rosters.

| Task  | How task was previously accomplished | How task is accomplished in Requests and Rosters |
|---|--------------------------------------|--|
| Update course sections to modify 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<br>on a scheduling team, an Ad<br>hoc filter, existing requests, or<br>from 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.  |                                      |  |

# **Requests and Rosters Navigation**

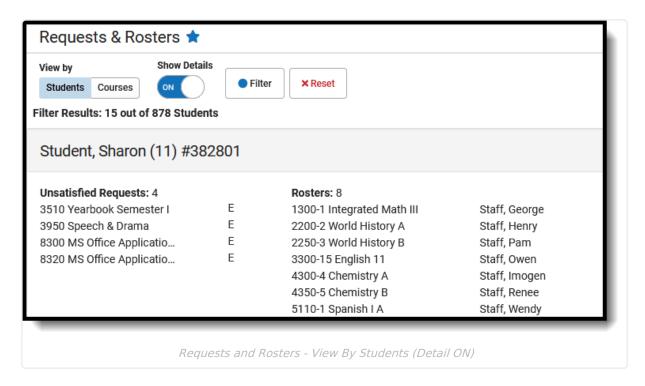
View by Students or Courses | Show Details | Filter | Expand All, Collapse All | More Scheduling Tools | Action Bar

When navigating from the Scheduling Board,

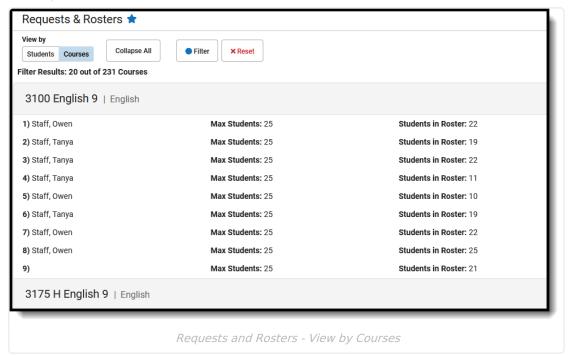
# **View by Students or Courses**

View by **Students** lists all students enrolled in the selected calendar.





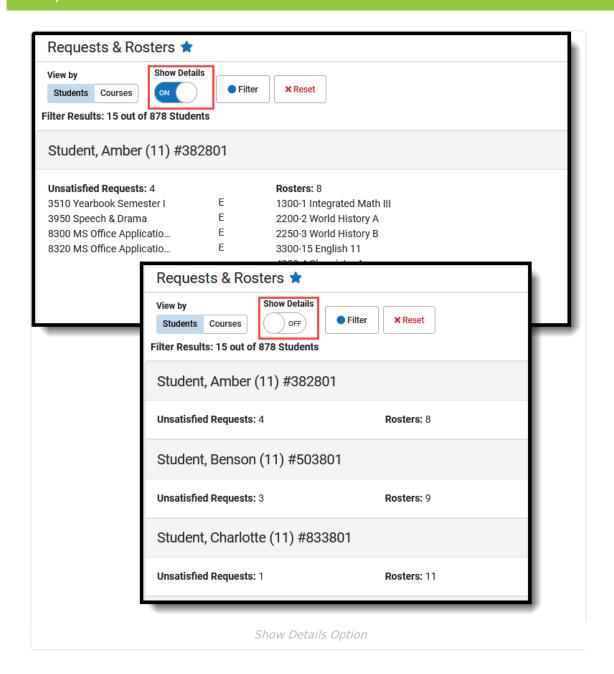
View by **Courses** lists all courses that are active in the selected calendar.



## **Show Details**

When viewing students, move the **Show Details** setting to **ON** to show the course names for the Unsatisfied Requests (also shows the type of Request - R (required,) E (Elected, or A (Alternate) and the course names where the student has a roster record, in addition to the total counts. Move the setting to **OFF** to display the number of Unsatisfied Requests the student has and the total number of roster records the student has.





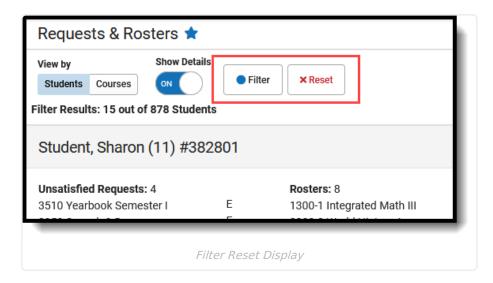
## **Filter**

ALWAYS filter the Students and Courses list so changes are only made to a selection of students and courses and NOT to the entire population of students and all courses.

Filtering the result set for both Students and Courses is recommended before performing any action that alters the students' placed sections or list of course requests, or the course section rosters.

When the list of students or courses is filtered, the Filter button displays with a blue dot and a **Reset** button displays. Click that Reset button to remove all filtered settings.



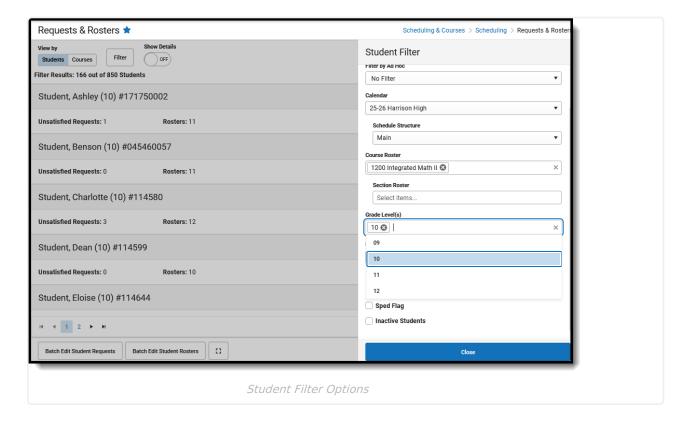


When working with Students, narrow the results by one or more of the following options.

- Student Name
- Filter by Ad hoc
- Unsatisfied Requests
  - Request Type
- Special Education (when a student has a
   Grade Level locked IEP)
- Inactive Students

- Calendar
  - Schedule Structure
- Course Roster
  - Section Roster

In the image below, filters are selected to show 10th grade students who have a roster record for Integrated Math II in the selected calendar.

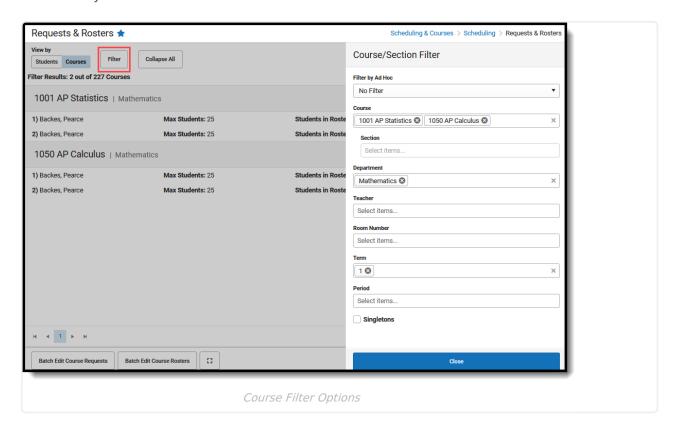




When working with Courses, narrow the results by one or more of the following options.

- Filter by Ad
  - hoc
- Room Number
- Term Period
- Course Name
- Singletons
- Section
- Department
- Teacher

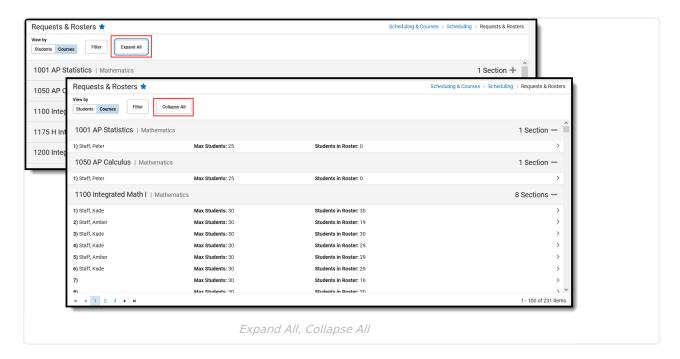
Multiple selections can be made for many of these fields. For example, when filtering by the Mathematics department, changes need to be made to AP courses within that department. Select the Department first, then select the AP Math courses. Any changes made will be made to those courses only.



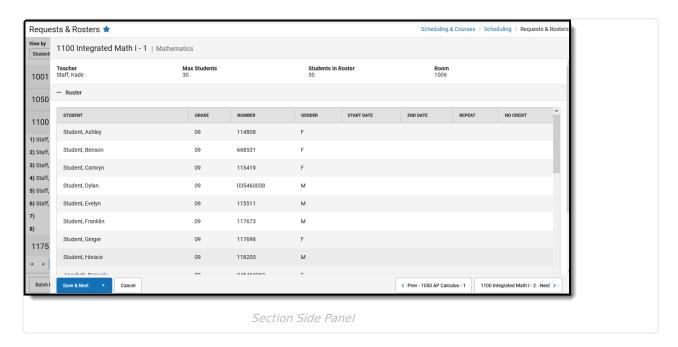
# **Expand All, Collapse All**

Use the **Expand All** button to open all courses to show the teachers assigned to the sections, the maximum number of students who can be enrolled in the courses, and how many students are currently scheduled into those sections.





When expanded, the total count of sections for the course displays on the right, along with a plus ( + ) to expand the course. Click > or anywhere in that section row to open the Section Side Panel see which students are enrolled in the section and the Room where the section is scheduled.



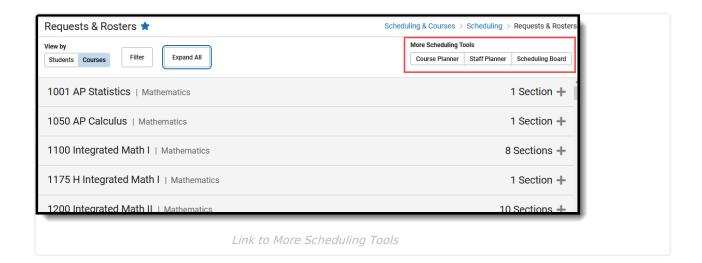
The side panel also includes options to manually build the section roster and modify the start and end dates for students scheduled into that section. See the COURSE SIDE PANEL Section below for more information.

# **More Scheduling Tools**

Access the **Scheduling Board, Course Planner** or **Staff Planner** from Requests and Rosters by selecting those options in the upper right corner.



This ONLY displays when navigating to Requests and Rosters from the Scheduling Board. When opening Requests and Rosters from the index, More Scheduling Tools DO NOT display.

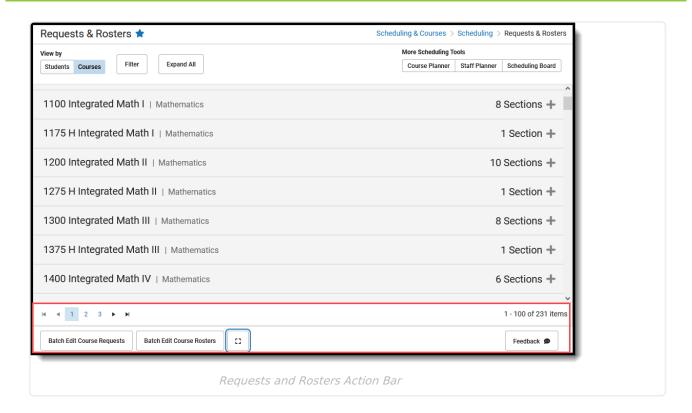


## **Action Bar**

Across the bottom of Requests and Rosters is the Action Bar. Available functions are:

- Page navigation to scroll through the list of courses and list of students. On the right side of the action bar, a count of total items displays.
- **Batch Edit** options to update Student Requests, Course Requests, Student Rosters, and Course Rosters. Additional Tool Rights are needed to perform these tasks.
- Full Screen viewing to expand the viewing window. Press ESC to exit full screen mode.
- Feedback to submit suggested updates to Requests and Rosters.





# Manage Requests and Rosters from the Student View

Filter Students List | Batch Edit Student Requests

## **Filter Students List**

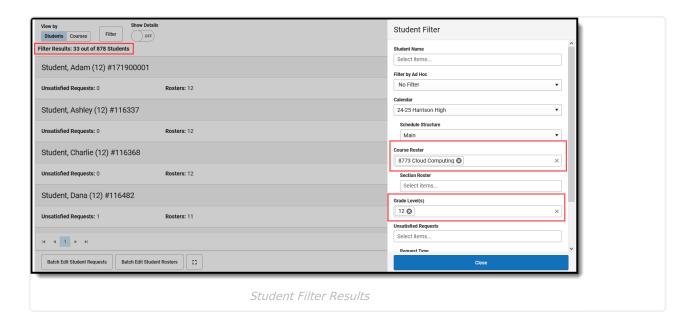
First, limit the number of students whose requests and schedules that are modified at one time. All actively enrolled students in the selected calendar are included in any change that is done to student requests and student rosters.

For example, when scheduling the entire senior class into their Senior Seminar, choose **12** in **Grade Level(s)**. Or, students who are scheduled into Concert Choir I also need to be scheduled into Concert Choir II, choose **Concert Choir I** in **Course Roster**.

- 1. Click **Filter.** The Student Filter side panel opens.
- 2. Enter data to narrow the full list of students to a manageable option using one of the available options. See the Student Filter Descriptions below.
- 3. Click **Close** when finished. Note that the **Filter Results** tally changes depending on what filter options are chosen.

In the image below, the entered Filter options is returning students who have an enrollment in Grade 12 in next year's calendar and who have a request for Cloud Computing. Now, the list of students who are affected by additional changes is now 33, instead of 878.





### **Student Filter Descriptions**

Click here to expand...

# **Batch Edit Student Requests**

This option modifies course requests students already have, either through the process of requesting courses or teachers recommending courses, or counselors adding requests for them.

Using the same set of students from above - 12th grade students who have a course request for Cloud Computing, the next step is to modify other requests for these students.

#### START HERE

Multiple sections at once

- 1. filter... grade 7 (or team blue)
- 2. batch edit student rosters.
- 3. filter to team.
- 4. select all. add students to teacher select.
- 5. pick which section to add students to.

total students selected. but the update only updates the students in the teacher's sections.

processing time could be affected.



#### Requests

- 1. all students from last year (filter option) who were in 6th grade. now in 7th grade.
- 2. 7th core. select 7th grade core. default is required but can be changed
- 3. add. if request already existed, it is not changed unless TYPE is changed

REMOVE - change Reg Type to blank.

#### COPY Course from last year

1. filter. last calendar. course and section. finding kids in that roster to place into another or 7 sections

# Manage Requests and Rosters from the Courses View

### **Filter Courses List**

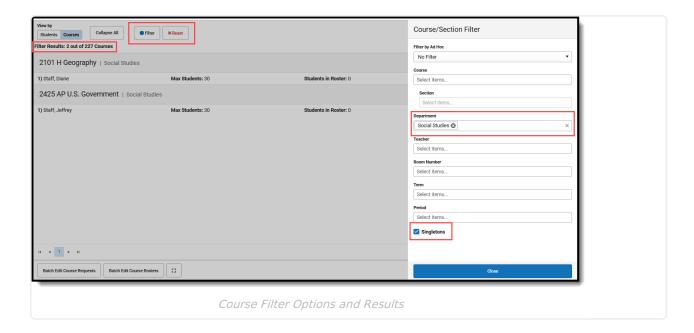
First, limit the number of courses that are modified at one time. All active courses in the selected calendar are included in any change that is done to course requests and rosters.

For example, the Social Studies courses that only meet one time during the year need to be scheduled first. Select the **Social Studies** in the **Department** dropdown, then mark the **Singleton** checkbox at the bottom of the Filter options. Course requests or course rosters are updated for only those courses, instead of the complete list of active courses.

- 1. Click **Filter.** The **Course/Section Filter** side panel opens.
- 2. Enter data to narrow the full list of courses to a manageable option using one of the available options. See the Course Filter Descriptions below.
- 3. Click **Close** when finished. Note that the **Filter Results** tally changes depending on what filter options are chosen, as all well as the Filter button having a blue button indicating filter options are selected and a Reset button displays to remove the filtered list of courses.

In the image below, the entered Filter options is returning courses in the Social Studies department that meet one time during the school year. Now, the list of courses to modify the course requests or the course rosters is 2 instead of 227.



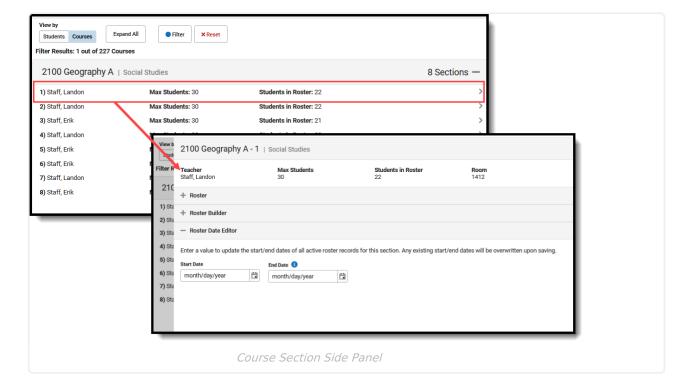


## **Course Filter Descriptions**

Click here to expand...

Once the list of courses is filtered to a manageable amount, modifications to the Courses can be done manually for each section or in batch for the courses.

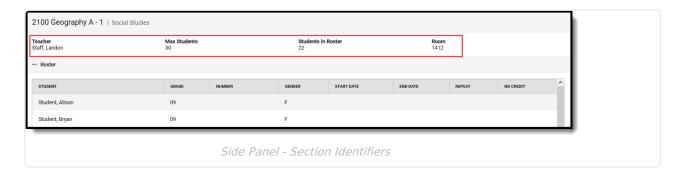
To work with one section, click anywhere in the row for a section to open the Course Section side panel. Here, the **Roster Builder** and the **Roster Date Editor** can be modified.



## **Course Section Side Panel**

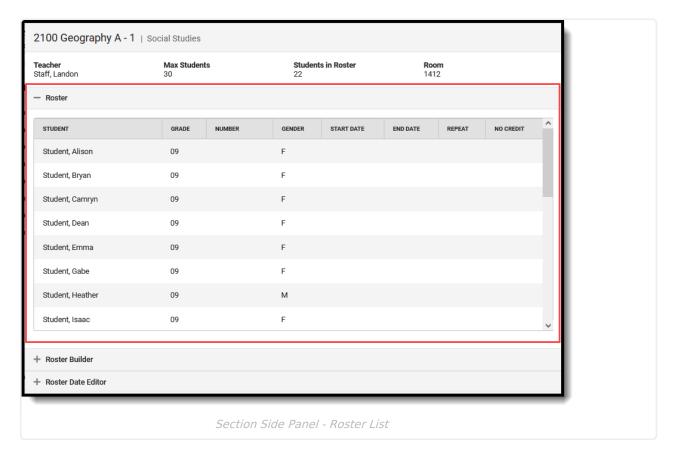


The section side panel provides a summary of the section that includes the **Teacher** name, the **Max Students** number, the number of **Students in Roster** (currently scheduled into the section) and in what **Room** that section meets. This information cannot be modified in the Requests and Rosters tool.



#### Roster

Next is the **Roster**, listing each student currently scheduled into the Section. It includes the Student name, Grade Level, Student Number and Gender, as well as the Start and End Date of the student being scheduled into that section, and whether the student is repeating the course or receiving No Credit for the course. The Roster cannot be edited from this view.

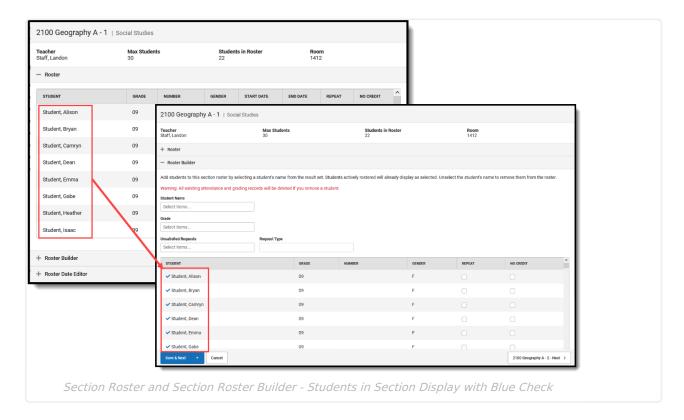


#### **Roster Builder**

However, changes can be made when using the **Roster Builder**. Here, students can be added to this section by clicking next to the student's name. Those students already scheduled into the



section display with a blue checkbox next to their name, and are the same students who display in the Roster list.



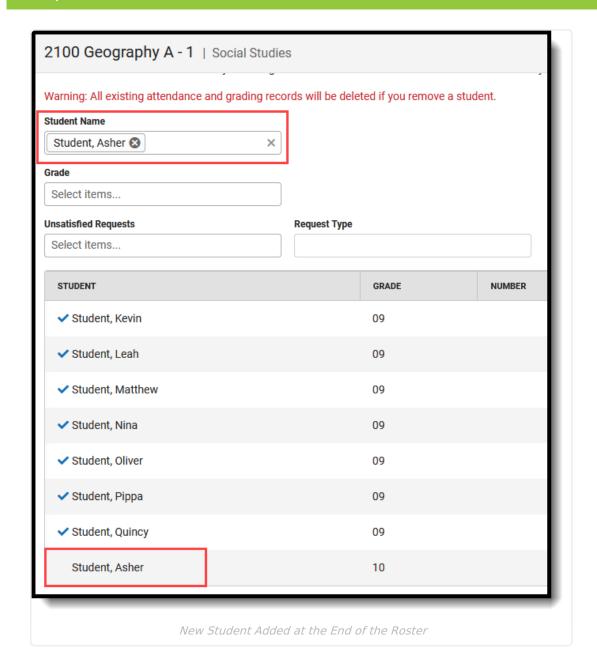
Add or remove students by entering the following in the search fields:

- Student Name
- Grade Level
- Unsatisfied Requests and Request Types

Multiple selections can be added to each of the search fields. When using Unsatisfied Requests, selection of the Request Types can only be added when ONE course is selected.

Newly added students are listed at the END of the roster without a blue check. The students are not added to the section until **Save** (**Save & Next, Save & Stay or Save & Close**) is selected and a green toast message displays.

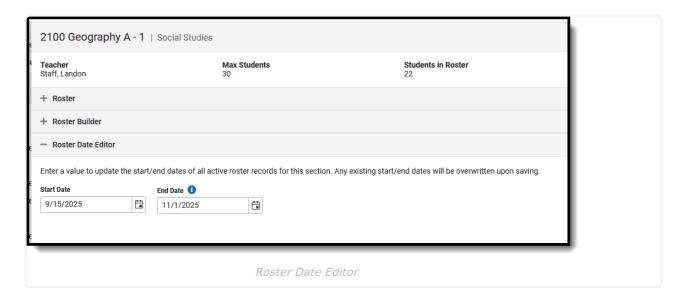




## **Roster Date Editor**

Modify the Start and End Dates for the Section for ALL students scheduled into the section. This is helpful when the section begins AFTER the start of the school year, or when a current section of a course needs to end prior to the end of the term.





Note the following date logic:

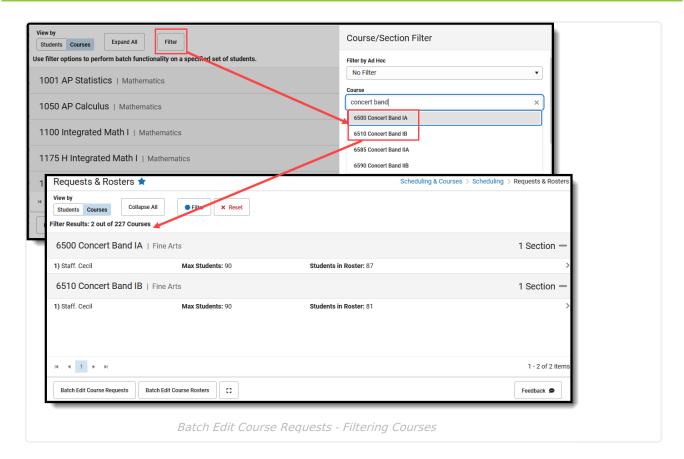
- The Start Date and End Date cannot overlap.
- The dates cannot be prior to the Section Start Date or after the Section End Date.
- Students not enrolled for the full date range are not scheduled.

## **Batch Edit Course Requests**

Use **Batch Edit Course Requests** to modify the requests that already exist for the selected course(s). This screen contains the same search options as the Roster Builder section, but focuses on the **Request Type**.

In this example, course requests for Concert Band 1A and 1B are being added for those students who have unsatisfied requests for those courses. First, filter the Courses view to display only those two courses.

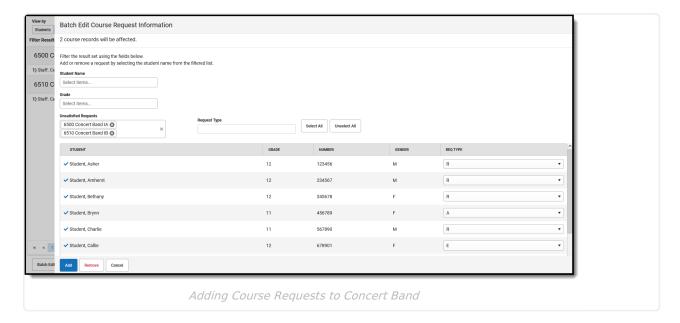




Add the course requests using the **Batch Edit Course Requests** option. This displays a side panel where requests can be added or removed for the selected students. When the specific student names are known, search by their names or grade levels. In this example, search for the Concert Band courses in the **Unsatisfied Requests** field to return all students who have a request for the Concert Band courses that have not been added to their schedule. Once the student names display, click **Select All**. This adds a blue checkmark next to their names and populates the **Request Type** field with R (Required), the default Request Type.

Instead of selecting all students, manually click next to the student name to select them. The Request Type field still populates automatically. The Request Type can be changed to **E (Elected)** or **A (Alternate)**, if desired. Asher's counselor knows he wants to be Concert Band, so the request type for him remains as R. For Brynn, she would rather take a Sociology course but she did enjoy Concert Band last year, so the request type for her is changed to an Alternate, meaning she'll be placed in Band if her schedule isn't filled with the Sociology course. And for Callie, her request type is changed to an E because she doesn't need another Fine Arts requirement but the ban director has asked her to participate again.

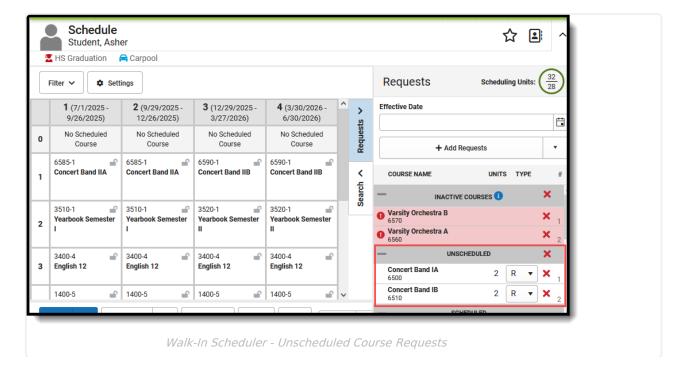




Now, click **Add**. A message displays indicating that the course requests are being added for BOTH Concert Band courses listed for the six students selected. A total of 12 requests are being added (6 students x 2 courses). Click **Continue**. This might not be the total number of requests added; when the student has an existing request for the course, another request for the same course is not added. Or, they may have a request for the course with a different Request Type, so a second request is not added.

A message displays indicating the total number of requests that were added. In this example, out of the 12 course requests to be added, only 7 were added. **Close** that message, and the screen returns to the filtered Courses view.

To verify requests were added for the students, navigate to their Walk-In Scheduler. The newly added requests are listed under **Unscheduled**. Or, generate one of the many Scheduling Reports, like the Request Batch Report or the Schedule Conflicts Report.

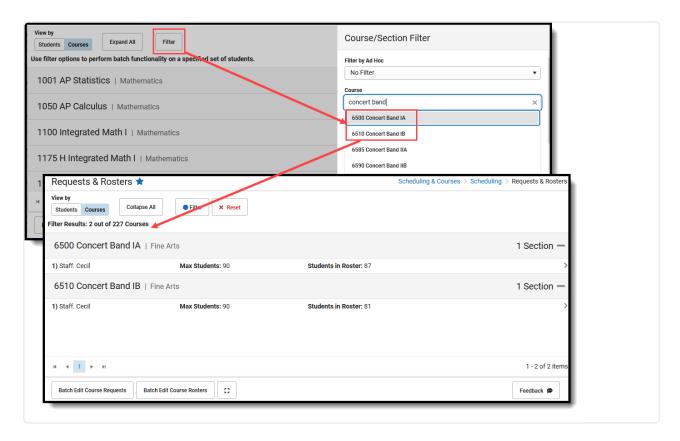




## **Batch Edit Course Rosters**

Batch Edit Course Rosters updates - adds or removes, depending - the selected course(s) rosters with the selected students. Unlike the Batch Edit Course Requests, this option updates the Section Rosters. Because of this, additional tool rights are needed. See the Tool Rights section below for more information.

For the Concert Band courses, those students who had course requests created are now being added to the section rosters. First step is to filter the course list to just the Concert Band 1A and 1B courses.



Batch Edit Course Requests - Filtering Courses

#### START HERE

Update the course rosters using the **Batch Edit Course Rosters** option. This displays a side panel where students can be added or removed to the rosters of the selected courses. When the specific student names are known, search by their names or grade levels. In this example, search for the Concert Band courses in the **Unsatisfied Requests** field to return all students who have a request for the Concert Band courses that have not been added to their schedule. Once the student names display, click **Select All**. This adds a blue checkmark next to their names.



Instead of selecting all students, manually click next to the student name to select them. The Request Type field still populates automatically. The Request Type can be changed to **E (Elected)** or **A (Alternate)**, if desired. Asher's counselor knows he wants to be Concert Band, so the request type for him remains as R. For Brynn, she would rather take a Sociology course but she did enjoy Concert Band last year, so the request type for her is changed to an Alternate, meaning she'll be placed in Band if her schedule isn't filled with the Sociology course. And for Callie, her request type is changed to an E because she doesn't need another Fine Arts requirement but the ban director has asked her to participate again.

Add or Remove students from a section.

- 1. Filter choose course, choose section. close.
- 2. roster.
- 3. Roster Builder. add or remove students.

save and close

this is a delete from section. be careful after section starts and student has attended. same functionality.

Add/Remove students from many sections at a time

- 1. filter. to team. returns all sections assigned to selected team.
- 2. batch edit course rosters.
- 3. add students by marking names. or searching for student with teams, etc.
- 4. add. students added to all selected course sections

Courses. for modify roster for start and end dates or repeat/no credit like roster batch edit

- 1. filter to sections.
- 2. repeat/no credit.
- 3. date... Roster Date editor. affects ALL students in section roster
- 4. note selected icon.

localized fields... not part of this project



Requests: prior to sched board/course/staff... prior to building

Result set from filtering displays.

•

- "find all students for calendar enrollment last year in first grade homeroom to put into second grade homeroom"
- o create request
- o batch edit. Add.
  - unsatisfied requests. change R to E.
  - Add is add or an update if it is there
- removing
  - set Type to blank.
  - if set to E or R, would only remove the E or R.
- Batch edit student rosters. prior to loading sections.
  - roster copy process..
  - LOCK

Course View

Batch Edit Student Requests/Course Requests

Batch Edit Student Rosters/Course Rosters

Full Screen

Side Panels

# Additional Information for Requests and Rosters

# **Tool Rights**

SAMPLE IMAGE. REMOVE BEFORE PUBLISHING. NEED DETAILS ON THIS.



| <b>&gt;</b> |  |   | ☐ All           | Read Write Add Delete Read Write Add Delete   |
|-------------|--|---|-----------------|---|
|             |  | cheduling   |                 | Read Write Add Delete   |
|             |  | Scheduling Center   |                 |   |
|             |  | Course Planner  |                 | ☐ Read ☐ Write ☐ Add ☐ Delete   |
|             |  | Requests & Rosters Modify Rosters Can Overload Sections Can Override Strict Student Constraints | All All All All | Read   Write   Add   Delete     Read   Write   Add   Delete     Read   Write   Add   Delete     Read   Write   Add   Delete     Read   Write   Add   Delete |
|             |  | Scheduling Board  |                 | ☐ Read ☐ Write ☐ Add ☐ Delete   |
|             |  | Staff Planner   | ☐ All           | Read Write Add Delete   |
|             |  |   |                 |   |