

# Entering Course Requests Procedural Checklist

## Change Log

Date	Section Number/Name	Change Description
7/7/20	Entire document	Review and update
11/15/19	Entire document	Review and update
11/26/18	Entire document	Update

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## Course Requests can be entered in any combination of the following three ways:

1. Enter requests student by student on either the **Requests** page or the **Request Assignments** page. This method is discussed in this document.
2. Bulk assigning requests to a group of students using the **Request Update Groups** page. This method is also discussed in this document.
3. Students enter their course requests for the upcoming school year using the internet and the Public Course Request Module. This method is discussed in the **Public Course Requests Procedural Checklist** document.

## Example of using all three methods of course request entry:

StudentInformation High School has a group of 100 students who will take band next school year. The office staff created a Course Request Mass Update Rule to assign the group of 100 students a request for Band with a couple clicks of the mouse. Next, the office staff manually entered requests for individual students who required specific courses such as AP Chemistry or AP Biology. Finally, the school configured the Public Course Request Module to allow students to go online and enter requests for courses they want to take in the upcoming school year.



If your school is not using the Batch Scheduler to schedule courses then there is no need to add requests. You can add the students directly into the assignments. Please see the **Elementary Scheduling Procedural Checklist** document for more information.



Course groups do not have a gender directive. If you give a student a request for a course group, the Batch Scheduler will not honor the gender directives set up on the courses that comprise the course group.

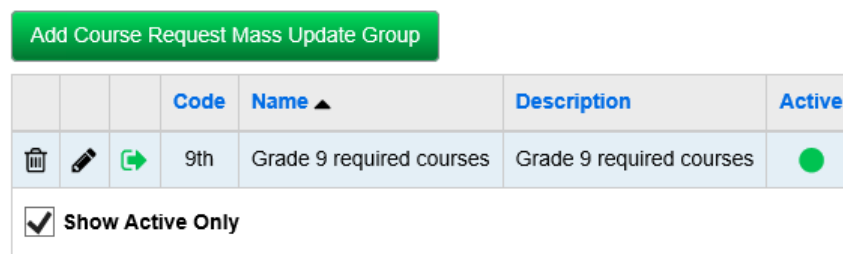
## Task #1 – Bulk Assigning Requests to groups of students using the *Course Requests Mass Update Groups* page.

**Note:** You may want to wait on Bulk Assigning Requests, until after manual entry and/or public entry has been completed, and the NORQ - Students with No Requests or Assignments report or Uncommitted Requests report have been ran.

1. Change the context to the building level and the school year you are working with.
2. Navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Request Update Groups**.
3. Click **Add Course Request Mass Update Group**.
4. Enter a **Code**, **Name**, and optional **Description**.
5. Click **Save**.
6. In this example, a Request Mass Update Group was created to assign requests for 9<sup>th</sup> grade required courses.

### Course Request Mass Update Groups

From this screen, you can display, add, change and delete Course Request Mass Update Groups.



			Code	Name ▲	Description	Active
			9th	Grade 9 required courses	Grade 9 required courses	

Show Active Only

7. Click on the **green arrow** icon to enter the individual rules.
8. Now, click **Add Mass Update Rule**.
9. Enter a **Rule Name** and **Rule Description**.
10. The first rule will be named 9<sup>th</sup> grade English. This rule will give all active and non-resident students a request for English 9.
11. You can use the **Student Status** filter to narrow down the list of students who will be assigned the request.
12. In the **Student Status** filter, pull over A - active resident student and N – Non-resident student to the right.
13. In the **Grade** filter, pull over grade 09 to the right.
14. No other filters were chosen.
15. In the bottom section, enter the course code for 9<sup>th</sup> grade English in the **Add Course** field.
16. Click **Save**.
17. The following message will display: **The Course Request Mass Update Rule was saved successfully.**

18. To add another rule, click **Add Mass Update Rule** and follow the previous steps.
19. When you are finished entering rules, click **Execute this Rule Group** to kick off the job that mass assigns the requests to the designated students.
20. A job will be sent to the Management screen. Wait for the job to complete.
21. Verify the mass assignment of requests was successful by going to the request page for a couple of students and verify the requests were added.

## Task #2 – How to bulk remove a request which will in turn bulk remove any assignments associated with the request.

1. Change the context to the building level and the school year you are working with.
2. Navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Request Update Groups**.
3. Click **Add Course Request Mass Update Group**.
4. Enter a **Code**, **Name**, and optional **Description**.
5. Click **Save**.
6. In the following example, a Request Mass Update Group will be created to delete all requests for Spanish1 which will also delete any associated assignments for Spanish1.
7. The rule will be called **Delete Spanish1**. This rule will delete all requests and associated assignments for Spanish1.
8. Click on the **green arrow** icon to enter the individual rules.
9. Now, click **Add Mass Update Rule**.
10. Enter a **Rule Name** and **Rule Description**.
11. No other filters were chosen. However, if you wanted to delete the request for Spanish1 for only certain grade levels or groups of students, use the filters to narrow down the list of students.
12. In the **Drop Course** field, enter the course code for Spanish1.
13. Click **Save**.
14. The following message will display: **The Course Request Mass Update Rule was saved successfully**.
15. Click **Execute this Rule Group** to kick off the job that mass deletes the requests and associated assignments from the designated students.
16. A job will be sent to the Management screen. Wait for the job to complete.
17. Verify the mass deletion of requests and the associated assignments was successful by going to the Request page of a couple of students and verify the requests/assignments were deleted.

### Task #3 – Assigning requests to individual students using the Request Assignments page.

1. Change the context to the building level and the school year you are working with.
2. To assign requests using the Request Assignments page, navigate to the following page with a student in context: **StudentInformation** » **SIS** » **Student** » **Student Schedule** » **Request Assignments**.
3. Choose a **Working Schedule** and **Result** and then click **Reload Screen**.
4. Click **Add Request**.
5. Use the **ellipse** icon to select a Course or type in the Course Code in the **Primary Course** field.
6. If you would like to enter an alternate request, enter the Course Code in the **Alternate Course** field. The Batch Scheduler can be configured to schedule alternate course requests if the primary request is not available. Please see the Batch Scheduler Procedural Checklist for details.
7. You can leave the **Priority** field empty and the priority will be filled in with the priority on the Course or you can enter a priority that will override the Priority value on the Course record in Course Maintenance.
8. If the student should be assigned to a course section taught by a particular teacher, choose the teacher from dropdown next to **Teacher**. If the student should be excluded from a certain teacher's sections then choose the teacher from the dropdown and check **Exclude**.
9. Likewise, if the student should be assigned to a course section taught in a certain period, choose the period from dropdown next to **Period**. If the student should be excluded from being scheduled into a certain period then choose the period from the dropdown and check **Exclude**.
10. Typically, if a student has restrictions for a specific teacher or period, the assignments are done manually to ensure the student gets in the proper course section. If the assignment is done manually, there is no need to enter a request for the course.
11. The **Request Status** section is for informational purposes only. Please see the Key in the Appendix section at the rear of this document.
12. Click **Save**.
13. The following message will display: **Request Saved**.
14. The request you added will display in the left section of the grid titled

Request	
Primary	Alt.

15. Continue adding requests using the above steps until all the desired requests for students have been entered.

## Task #4 - Assigning Requests to individual students using the Requests page.

1. Change the context to the building level and the school year you are working with.
2. To assign requests using the Student Requests page, navigate to the following page with a student in context: **StudentInformation** » **SIS** » **Scheduling** » **Requests**.
3. With a student in context, choose a schedule from the 1<sup>st</sup> dropdown on the left.
4. Click **Add Request**.
5. Use the **ellipse** icon to select a Course or type in the Course Code in the **Primary Course** field.
6. If you would like to enter an alternate request, enter the Course Code in the **Alternate Course** field. The Batch Scheduler can be configured to schedule alternate course requests if the primary request is not available. Please see the Batch Scheduler Procedural Checklist for details.
7. You can leave the **Priority** field empty and the priority will be filled in with the priority on the Course or you can enter a priority that will override the Priority value on the Course.
8. If the student should be assigned to a course section taught by a particular teacher, choose the teacher from dropdown next to **Teacher**. If the student should be excluded from a certain teacher's sections then choose the teacher from the dropdown and check **Exclude**.
9. Likewise, if the student should be assigned to a course section taught in a certain period, choose the period from dropdown next to **Period**. If the student should be excluded from being scheduled into a certain period then choose the period from the dropdown and check **Exclude**.
10. Typically, if a student has restrictions for a specific teacher or period, the assignments are done manually to ensure the student gets in the proper course section. If the assignment is done manually, there is no need to enter a request for the course.
11. The **Request Status** section is for informational purposes only. Please see the Key in the Appendix section at the rear of this document.
12. Click **Save**.
13. You will receive the following message: **The Request saved successfully**.
14. Continue adding requests using the above steps until all the desired requests for students have been entered.

## Task #5 - Run scheduling reports to verify scheduling data

1. The scheduling reports will help you verify requests, determine if you have enough course sections to accommodate the requests, and the course section meeting times are not creating conflicts for key courses.
  - a. Scheduling reports can be found by navigating to **StudentInformation** » **SIS** » **Scheduling** » **Scheduling Reports**.
  - b. All the following reports are optional, however it is highly recommended that you run and verify these reports before proceeding. Scheduling reports do not have to be run in order to use the Batch Scheduler, but the reports will help verify students have the proper requests and you have the proper course sections setup to accommodate the requests before you run the Batch Scheduler.
2. Run the **Course Curriculum (CRSE)** report. This report allows you to select up to ten customized fields which will help you verify the course weight, course abbreviations, course names, etc.
3. TIP #1: Run CRSE report to see if study halls are marked as Course Type = Study Hall so when the Study Hall Wizard is run, the study halls will be assigned properly.
4. TIP #2: Run CRSE report to see if courses have the correct course priority, demand count, etc.
5. Next, run the **Students with No Requests or Assignments (NORQ)**. This report produces a list of students who do not have any requests and therefore will not be scheduled by the Batch Scheduler.
6. TIP: Run the NORQ report for Active and Non-Resident students to see which students have not put in requests yet.
7. The **Students Course Requests (REQU)** report allows you to print a list of each student's course requests. This report will not tell you if their requests have a **Pending** status.
8. If you would like a listing of students who used the Public Module and their requests have a Pending status, you can navigate to:  
**StudentInformation** » **Management** » **School Administration** » **Public Administration** » **Uncommitted Requests**.
  - a. Choose either **Unapproved by Parent/Guardian** or **Uncommitted by Student**.
  - b. The **Uncommitted Requests** page will give you a list of students whose requests do not have an **Approved** status. If you need to print this page, you can click **File – Print**.
9. The **Course Request Labels (R206)** can be run to generate student labels to affix to course request sheets.
10. Next, to ensure students have met all pre and co-requisites for a request, do not have any invalid course requests, or they do not meet the gender or grade requirements of the course, run the **Student Course Request Verification (R401)**.



- a. The report will list each student's requests. The report also has the option to only print students with error messages.
  - b. The **R401** Error Code Key is as follows:
 

ALT	Alternate Course ID not valid for Group
INV	Invalid Course ID
SEX	Sex restriction not met
GRD	Grade restriction not met
OTH	Other restrictions to be checked manually
DUP	Duplicate Course Requests
PRQ	Prerequisites not met
COQ	Co-requisites not met
11. Next, the **Tally Of Student Course Requests (R402)** will list each course and the number of students requesting each course. You can use this report to ensure the course sections have enough capacity to accommodate all the requests.
  12. The **Potential Course Conflicts Matrix (R403)** report can be used to generate a matrix listing of each course ID against all other course IDs in order to determine the number of conflicts that would result if two courses were offered only 1 time (singleton) within the same block/period of the day. The forecasted number of conflicts will be printed at the intersection point on the matrix corresponding to each pair of courses. You can use the report to analyze requests to determine how many sections of a course are needed, and if the requests create any time conflicts.
  13. The **Student Who Requested A Specific Course (R404)** report allows the user to receive a list of students that have requested a specific course. The report also has the ability to list the courses that have less than a specified number of requests.
  14. The **Students Requesting A Specific Course Pair (R405)** report produces a list of students that have requested a specified pair of courses. Once you have determined which courses are singletons by running either the **R403** or **R406** report, you can run the **R405** report to see which students will actually have a conflict if the meeting times on the two courses are left the same (singleton).
  15. The **Potential Course Conflicts (R406)** report is used to generate a table listing each course ID against all other course IDs that have been jointly requested by one or more students, in order to determine the number of conflicts that would result if the two courses were offered only one time (singleton) within the same block/period. Optionally, this report can be based on only those courses where the number of students requesting the course is less than or equal to the number specified on the report submission screen.
  16. Next, the **Course Request Verification Slip (R416)** can be run to create verification slips to pass out to students so they can verify their course requests for accuracy. The report has the option to print one student per page and also has the option to print student's current schedule in 19/20 and their requests for 20/21.

## Appendix A: Request Status Key

	Student Information	Guardian	Student
Request Status:	<input type="checkbox"/> Mass Request Rule Created	<input type="checkbox"/> Guardian Created	<input type="checkbox"/> Student Created
	<input checked="" type="checkbox"/> Locked	<input type="checkbox"/> Guardian Pending	<input type="checkbox"/> Student Pending
	<input checked="" type="checkbox"/> Approved	<input type="checkbox"/> Guardian Locked	
		<input type="checkbox"/> Guardian Approved	<input type="checkbox"/> Student Committed

1. **Request Status: StudentInformation:**
  - a. **Mass Request Rule Created:** Denotes if the request was added by using the Course Request Mass Update Groups page.
  - b. **Locked:** Denotes if a request was added by the office staff either manually for a single student or by using the Course Requests Mass Update Groups page. If a request is locked, the request will show on the Public Course Request Module, but the student cannot delete the request or change the request.
  - c. **Approved:** Denotes any request added directly to a student's Requests page, Request Assignments page, or added in bulk using the Course Request Mass Update Groups page and is automatically marked as Approved. If the request was added by the student using the Public Course Request Module, the request is marked Approved after the student hits Commit. Please see the Public Course Requests Procedural Checklist for more details.
2. **Request Status: Guardian:** – used in conjunction with the Public Course Request Module.
  - a. **Guardian Created:** Denotes if a guardian account was used to add the request. Please see the Public Course Requests Procedural Checklist for more information on Guardian accounts.
  - b. **Guardian Pending:** Denotes if the guardian account entered requests, but forgot to click Commit. Please see the Public Course Requests Procedural Checklist for more information on Guardian accounts.
  - c. **Guardian Locked:** Denotes if the guardian account entered and locked the request, not allowing the student to edit or delete the request. Please see the Public Course Requests Procedural Checklist for more information on Guardian accounts.
  - d. **Guardian Approved:** Denotes if the request was entered by the guardian and the guardian hit Commit.
3. **Request Status: Student:** - used in conjunction with the Public Course Requests Module.
  - a. **Student Created:** Denotes if the request was entered by the student using the Public Course Requests Module.
  - b. **Student Pending:** Denotes if the request was entered by the student using the Public Course Request Module and the request is pending because the student has not clicked Commit yet.

- c. **Student Committed:** Denotes if the request was entered by the student using the Public Course Requests Module and the student has finalized their requests by clicking Commit.



Only requests that are marked as **Approved** are scheduled by the Batch Scheduler.