Scheduling Workflow for Building

02/16/2026 7:41 am EST

Use the information below as a workflow for scheduling in the upcoming year.

| Part 1 | Part 2 | Part 3 | Part 4 |

Part 1

Task	Completed
NC Course Codes ○ Available in December - Course Code Master List | NC DPI (https://docs.google.com/spreadsheets/d/1kPfuckZeFMqckAKRKHdkM-RdGKEg6rrrTPHOpmTPZQI/edit?gid=0#gid=0) ○ Update current course master information (departments, max students, etc.). This is done by SIS Coordinators, outside of any particular calendar. ○ Once changes are made, wait until the next year calendar is created. Once the calendar is created and the courses have been copied, the course master updates can be pushed to the next year calendar. Do not push to the current calendar.	☐
Assign/Update District Assignments ○ Create future year District Assignments for teachers that are moving schools (*Census > Staff > District Assignments*) ○ District Assignments | Infinite Campus (https://kb.infinitecampus.com/help/district-assignments) ○ Assign teachers to Departments (*Census > Staff > District Assignments*) ○ Make sure the department is added to the correct school and assignment	☐

Task	Completed

Create School Year (*Scheduling & Courses > Calendar Setup > School Year Setup*)
  ◦ Scheduling Prep: Calendar Setup For Upcoming Year - Study Guide | Infinite Campus
    (https://kb.infinitecampus.com/help/scheduling-prep-calendar-setup-for-upcoming-year-study-guide#define-the-next-school-year)
  ◦ Label - XX-XX
  ◦ Start Date 7/1/XXXX; End Date 6/30/XXXX
	☐

Create New Calendars (*Scheduling & Courses > Calendar Setup > Calendar Wizard*)
  ◦ Determine which calendar option to choose - Scheduling Prep: Calendar Setup For Upcoming Year - Study Guide | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-prep-calendar-setup-for-upcoming-year-study-guide#determining-what-calendar-option-to-choose)
  ◦ Create New Blank Calendars - only for new schools - Scheduling Prep: Calendar Setup For Upcoming Year - Study Guide | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-prep-calendar-setup-for-upcoming-year-study-guide#create-new-blank-calendars)
  ◦ Create New Calendars by Roll Forward Calendars with selected data - Scheduling Prep: Calendar Setup For Upcoming Year - Study Guide | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-prep-calendar-setup-for-upcoming-year-study-guide#determining-what-calendar-option-to-choose)
    ◦ Choose *Year Schoolname* template
    ◦ Start Date **7/1/XXXX**; End Date **6/30/XXXX**
    ◦ Select: Calendar Attributes, Schedule Structures, Term Schedules, Period Schedules, Section Templates, Portal calendar and term settings, Grade Levels, Courses
	☐

Delete special period schedules (*Scheduling & Courses > Calendar Setup > Period Setup*) *Make sure the calendar context is the future year.*	☐

Delete any courses in the future year calendar that will not be used (*Scheduling & Courses > Courses > Course Information*)
  ◦ Check the NC Course Code Master List for disabled courses to delete
  ◦ Use the Disabled Course Codes (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/disabled-course-codes) article for more information on filters to find existing disabled courses.
Make sure the calendar context is the future year.
	☐

Add Term Dates (*Scheduling & Courses > Calendar Setup > Term Setup*) ◦ Calendar Terms | Infinite Campus (https://kb.infinitecampus.com/help/terms) *Make sure the calendar context is the future year.*	☐

Task	Completed
Day Setup (*Scheduling & Courses > Calendar Setup > Day Setup*) ○ Day Reset - Day Setup | Infinite Campus (https://kb.infinitecampus.com/help/day-setup#Days-DayReset) establishes the instructional days (first instructional day to last instructional day) ○ Day Rotations Day Setup | Infinite Campus (https://kb.infinitecampus.com/help/day-setup#Days-DayRotations) establishes the rotation of the period schedules (single day schedules will not show rotations) **Make sure the calendar context is future year.*	☐
School Months (*Scheduling & Courses > Calendar Setup > School Months*) • Add School Months dates - School Months (North Carolina) | Infinite Campus (https://kb.infinitecampus.com/help/school-months-north-carolina) ○ *School Months can be added at a later time, but before the beginning of the new school year. **Make sure the calendar context is future year.*	☐
Roll Forward the rest of the Calendar to Copy (*Scheduling & Courses > Calendar Setup > Calendar Wizard*) ○ Calendar Wizard | Infinite Campus (https://kb.infinitecampus.com/help/calendar-wizard-a#pick-the-data-to-copy) - Choose Copy Data into Existing Calendar ○ Copy/Append - will not overwrite information in new calendar ○ Select the remaining data to copy: Sections with Schedule Placement, Teacher Assignments, Room Assignments, Grading Tasks, Credits, Standards, Grade Calc Options, Categories, Course Rules, Schedule Building Constraints, Course Fees, Attendance Excuse Codes, Scheduling Teams, Section Team Assignments, Calendar Overrides, GPA Calculations.	☐
Roll Forward Student Enrollment (*Student Information > General Student Administration > Enrollment Roll Forward Wizard*) ○ Enrollment Roll Forward Wizard | Infinite Campus (https://kb.infinitecampus.com/help/enrollment-roll-forward) 　○ Do not choose 12th Grade 　○ Do not choose 5th or 8th grades (transition students can be completed separately to select the destination calendar) 　○ Select **E1: Init enroll - this year** as the Local Start Status 　○ Select **Primary** as the Source Service Type 　○ Select **Main** as the Source Structure 　○ General Roll Forward Logic - Enrollment Roll Forward Wizard | Infinite Campus (https://kb.infinitecampus.com/help/enrollment-roll-forward#enrollment-roll-forward-logic) ○ Assign Graduation Programs to use academic planning options - Graduation Program Assignment | NC Department of Public Instruction (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/graduation-program-assignment)	☐

Task	Completed
Assign/Update Tool/Calendar Rights (*User Management > User Groups > Calendar/Tool Rights*) ○ Scheduling Tool Rights (https://kb.infinitecampus.com/help/tool-rights-scheduling) ○ Calendar Rights (+1 year) ○ Add the future year to the + calendar user group ○ Remove any previous years in the + calendar user group	☐

Part 2

Task	Completed
Update Course Information (in the future year calendar only) (*Scheduling & Courses > Courses > Add Course*) • Follow the NCDPI Course Code Master List (https://docs.google.com/spreadsheets/d/1kPfuckZeFMqckAKRKHdkM-RdGKEg6rrrTPHOpmTPZQI/edit?gid=0#gid=0) • Mark courses no longer being used as inactive or delete them from the new school year calendar as needed at the school level ○ ***Be sure to be in the future school year when deleting courses.*** • Add new courses that will be offered for the year from the course master selection • Update course scheduling fields (Any changes made to the course masters during prep, can be pushed to the courses and course sections in the future calendar.) ○ Attach Departments to Course Masters or Courses ○ *Check the number terms, schedules and periods of the Course ○ Determine if the course can be requested by students in the Portal via Course Master level or Course level (Allow student requests) ○ Determine if the course can be requested by teachers via Course Master level or Course level (Allow teacher requests/recommendations) ○ *Select the desired scheduling priority (if applicable) ○ Determine if the course can be repeated (Repeatable) - Admin can select a course to retake without this checked, but students cannot select a course again, if this is unchecked. *Note: Some course information can be viewed/updated using the Course Planner Tool (https://kb.infinitecampus.com/help/course-planner-course-planner). *Make sure the calendar context is future year.*	☐

Task	Completed
Establish Course Rules (http://kb.infinitecampus.com/help/course-rules) (*Scheduling & Courses > Courses > Course Rules*) • Scheduling Rules (used with building and loading) - Course Rules | Infinite Campus (https://kb.infinitecampus.com/help/course-rules#scheduling-rules) • Planning Rules (used with course plans) - Course Rules | Infinite Campus (https://kb.infinitecampus.com/help/course-rules#planning-rules) *Make sure the calendar context is future year.*	☐
Establish Student Constraints (*Scheduling & Courses >Build Schedules > Student Constraints Setup*) • Student Constraints | Infinite Campus (https://kb.infinitecampus.com/help/student-constraints) • Set strict or not strict constraints between students *Make sure the calendar context is future year.*	☐

Part 3

Task	Completed
Add Course Requests Choose which option to use to add course requests. More than one of the options below can be used to enter course requests. However, if using course plan, the planned courses must be created into course requests before using the other course request tools. *Make sure the calendar context is future year.*	☐
Course Plan (*Student Information > Academic Planning > Course Plan*) The following should be completed in order when using planned courses for course requests • All students must have a Graduation Program to use the course plan. Follow the instructions in the Graduation Program Assignment (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/graduation-program-assignment) article for assigning programs. (*Student Information > Academic Planning > Programs*) ◦ Run the Academic Plan Status Report | Infinite Campus (https://kb.infinitecampus.com/help/academic-plan-status-report) to show students without an active program. (*Student Information > Program Administration > Academic Plan Status Report*) • Portal Display Options enabled for academic plan for students to add planned courses (*System Settings > Portal Preferences > Portal Display Options*) ◦ Portal Display Options | Infinite Campus (https://kb.infinitecampus.com/help/portal-display-options) • Teacher Recommendations (if using) ◦ Student Course Recommendations (Instruction) | Infinite Campus (https://kb.infinitecampus.com/help/student-	

Task	Completed

course-recommendations-instruction)
 	
• Student or Admin add planned courses to the course plan. (*Student Information > Academic Planning > Course Plan*)
  ○ Course Plan (Academic Planning) | Infinite Campus (https://kb.infinitecampus.com/help/course-plan-academic-planning)
 	
• Lock Course Plans once courses have been updated. (*Student Information > Program Administration > Course Plan Administration*)
  ○ Course Plan Administration | Infinite Campus (https://kb.infinitecampus.com/help/course-plan-admin)
 	
• Run reports to review course plans prior to creating requests from the planned courses
  ○ Calculate On-Track Status with the updated course plans. (*Student Information > Program Administration > Course Plan Administration*)
    ▪ Course Plan Administration | Infinite Campus (https://kb.infinitecampus.com/help/course-plan-admin#calculate-on-track-status)
    ▪ This process is taxing on the system and should be run after normal operating hours.
  ○ Run the Academic Plan Status Report | Infinite Campus (https://kb.infinitecampus.com/help/academic-plan-status-report) to see if the updated planned courses meet the requirements for the graduation program. (*Student Information > Program Administration > Academic Plan Status Report*)
  ○ Academic Plan Progress Batch | Infinite Campus (https://kb.infinitecampus.com/help/academic-plan-progress-batch) can be used to see individual student academic plans. (*Student Information > Program Administration > Academic Plan Progress Batch Report*)
  ○ Course Plan Batch | Infinite Campus (https://kb.infinitecampus.com/help/course-plan-batch) can be used to see several students' academic plans in one report. (*Student Information Program Administration > Course Plan Batch Report*)
 	
• Create course requests from planned courses (*Student Information > Program Administration > Course Plan Administration*)
  ○ Course Plan Administration | Infinite Campus (https://kb.infinitecampus.com/help/course-plan-admin#CoursePlanAdmin-CreateCourseRequests)
 	
*Make sure the calendar context is future year.
	☐

Requests & Rosters (*Scheduling & Courses > Scheduling > Requests & Rosters*) • Requests and Rosters | Infinite Campus (https://kb.infinitecampus.com/help/requests-and-rosters) • Use this tool to add requests to students in mass. • *Reminder: Check the "Include Inactive Students" checkbox to work with students in the future year. **Make sure the calendar context is future year.*	☐

Task	Completed
Walk-in Scheduler (*Student Information > General > Schedule*) • Walk-In Scheduler | Infinite Campus (https://kb.infinitecampus.com/help/walk-in-scheduler#Walk-InScheduler-AddRequests) • Add requests to individual students *Make sure the calendar context is future year.*	☐
Course Registration (*Student Portal > More > Course Registration*) • Course Registration (Campus Student) | Infinite Campus (https://kb.infinitecampus.com/help/course-registration-campus-student) • Tool must be enabled in Portal Display Options. • Any course that has allow student requests checked will be displayed for the student to choose. • Requests are added as Elected or Alternate. • Students cannot remove any Required requests. *Make sure the portal display option is enabled for the future year.*	☐
Run Reports Check course requests by using the reports below. Other reports may be used as well. • Schedule Units Report (*Scheduling & Courses > Reports > Schedule Units Report*) ○ Schedule Units Report | Infinite Campus (https://kb.infinitecampus.com/help/schedule-units-report) ○ Use this report to find under requested students • Requests Satisfied Report (*Scheduling & Courses > Reports > Requests Satisfied Report*) ○ Requests Satisfied | Infinite Campus (https://kb.infinitecampus.com/help/requests-satisfied) ○ Use this report to see how many requests there are per course • Request Conflicts Report (*Scheduling & Courses > Reports > Request Conflict Report*) ○ Request Conflicts Report | Infinite Campus (https://kb.infinitecampus.com/help/request-conflicts) ○ Use this report to see a list of possible conflicts with requests • Request Batch Report (*Scheduling & Courses > Reports > Request Batch Report*) ○ Request Batch Report | Infinite Campus (https://kb.infinitecampus.com/help/request-batch) ○ This will print requests by students as one page per student *Make sure the calendar context is future year.*	☐

Part 4

Task	Completed
Scheduling Board (*Scheduling & Courses > Scheduling > Scheduling Board*) • Copy trials to maintain previous schedules ○ Scheduling Board Trials | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-board-trials-new) • Set Scheduling Board Options ○ Scheduling Board | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-board-new#settings) • Set Scheduling Board build settings (max periods, max courses) ○ Scheduling Board | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-board-new#build-settings-side-panel) *Make sure the calendar context is future year.*	☐
Staff Planner (*Scheduling & Courses > Scheduling > Staff Planner*) Use this tool to update individual teachers or in mass. Updating these settings will allow the system to automatically assign teachers to sections with the correct constraints. • Staff Planner | Infinite Campus (https://kb.infinitecampus.com/help/staff-planner-staff-planner) • Add teacher course assignments • Assign rooms to teachers • Assign teams to teachers • Add Teacher constraints • Update individual teachers' max periods, max courses, etc. if different from the default *Make sure the calendar context is future year.*	☐
Course Planner (*Scheduling & Courses > Scheduling > Course Planner*) Use this tool to update individual courses or in mass. • Course Planner | Infinite Campus (https://kb.infinitecampus.com/help/course-planner-course-planner) • Set sections to build, max students, load priority • Set number of sections to build per teacher • Set Placement restrictions • Set Scheduling Rules *Make sure the calendar context is future year.*	☐

Task	Completed
Build the Schedule (*Scheduling & Courses > Scheduling > Scheduling Board*) Use this tool to create trials and build or adjust a schedule. To maximize efficiency, it's recommended to complete all setup preparations, including course planner updates, staff planner updates, and course requests if you're building. • Scheduling Board | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-board-new#build) • Use the build settings to set build defaults • Build by Department, Course or run a Full build. • Use the board view settings for highlights to see possible issues. • Unbuild by department, course or full unbuild to restart the build process. • Lock departments, courses, or sections to keep those in place. • Drag and drop to move sections. • Make changes as needed in staff and course planner. • Run reports to check the build. ○ Master Schedule Report (Scheduling & Courses > Reports > Master Schedule Report) ○ Teacher Schedule Batch Report (Scheduling & Courses > Reports > Teacher Schedule Batch Report) ○ Room Usage Report (Scheduling & Courses > Reports > Room Usage Report) *Make sure the calendar context is future year.*	☐
Load Students (*Scheduling & Courses > Scheduling > Scheduling Board*) Course requests must be added to student's records before using the load tool. • Scheduling Board | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-board-new#load-all-courses) • Set Load Settings - Scheduling Board | Infinite Campus (https://kb.infinitecampus.com/help/scheduling-board-new#load-settings-side-panel) • After the schedule has been built, load by department, course, or run a full load. • Unload by department, course or run a full unload. • Lock rosters by department, course, section, or grade level to keep students in the section. *Make sure the calendar context is future year.*	☐

Task	Completed
Run Reports (*Scheduling & Courses > Reports*) Use the reports below to see the load results for students' requests. - Schedule Units Report | Infinite Campus (https://kb.infinitecampus.com/help/schedule-units-report) - Use this report to find under requested students. - Requests Satisfied | Infinite Campus (https://kb.infinitecampus.com/help/requests-satisfied) - Use this report to see how many requests there are per course. - Request Conflicts Report | Infinite Campus (https://kb.infinitecampus.com/help/request-conflicts) - Use this report to see a list of possible conflicts with requests. - Request Batch Report | Infinite Campus (https://kb.infinitecampus.com/help/request-batch) - This will print requests by students as one page per student. *Make sure the calendar context is future year.*	☐
Other Helpful Reports (*Scheduling & Courses > Reports*) - Staff History Report | Infinite Campus (https://kb.infinitecampus.com/help/staff-history-report) - Determine if any sections are without a primary teacher. - Seat Count Report | Infinite Campus (https://kb.infinitecampus.com/help/seat-count) - See the number of students per period. - Section Roster Report | Infinite Campus (https://kb.infinitecampus.com/help/section-roster-report) - See rosters for teachers as needed. - Schedule Batch Report | Infinite Campus (https://kb.infinitecampus.com/help/schedule-batch-report) - See individual student schedules. - Teacher Schedule Batch Report | Infinite Campus (https://kb.infinitecampus.com/help/teacher-schedule-batch-report) - See individual teacher schedules. *Make sure the calendar context is future year.*	☐
Lock Scheduling Board (*Scheduling & Courses > Scheduling > Scheduling Board*) - The active trial is the visible schedule. - Lock the final trial. When the future year becomes the active year, the active trial will automatically lock. - Users with tool rights can unlock the trial, but it will lock back once saved. - Remove tool rights to the scheduling board when scheduling should be adjusted using course/sections and student's schedules.	☐

Task	Completed

Fill Student Gaps
Run Reports to identify gaps and/or issues
 	
- Student Gap Scheduler (*Scheduling & Courses > Load Schedules > Student Gap Scheduler*)
  - Student Gap Scheduler | Infinite Campus (https://kb.infinitecampus.com/help/student-gap-scheduler)
 	
- Schedule Gap Filler (*Scheduling & Courses > Load Schedules > Schedule Gap Filler*)
  - Schedule Gap Filler | Infinite Campus (https://kb.infinitecampus.com/help/schedule-gap-filler)
 	
- Requests Satisfied Report (*Scheduling & Courses > Reports > Requests Satisfied Report*)
  - Requests Satisfied Report | Infinite Campus (https://kb.infinitecampus.com/help/requests-satisfied)
 	
- Seat Count Report (*Scheduling & Courses > Reports > Student > Seat Count Report*)
  - Seat Count Report | Infinite Campus (https://kb.infinitecampus.com/help/seat-count)
 	
- Manually add alternates using the Walk in Scheduler
	☐

NCSIS Knowledgebase | Article: Scheduling Workflow for Building | Last Updated: 02/16/2026 7:41 am EST