

# Scheduling Workflow Copied Schedule

04/22/2026 8:42 am EDT

The following information includes a workflow to assist users on making minor changes to an existing schedule.

*NCDPI is still updating options in this article, and it is not recommended to print the article at this time.*

## Part 1

Task	Completed
<b>Complete Future Year Setup</b> <ul style="list-style-type: none"> <li>• Create Future Year (<a href="https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/create-future-year">https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/create-future-year</a>)</li> </ul>	<input type="checkbox"/>
<b>Complete New Calendar Setup</b> <ul style="list-style-type: none"> <li>• Create Future Calendars - Single Phase Process (<a href="https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/create-future-calendars-single-phase-process">https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/create-future-calendars-single-phase-process</a>)</li> </ul>	<input type="checkbox"/>
<b>Create Future Enrollments</b> <ul style="list-style-type: none"> <li>◦ Create Future Enrollments (<a href="https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/future-enrollments">https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/future-enrollments</a>)</li> </ul>	<input type="checkbox"/>
<b>Assign/Update District Assignments</b> <ul style="list-style-type: none"> <li>◦ Create future year District Assignments for teachers that are moving schools ( <i>Census &gt; Staff &gt; District Assignments</i> )                             <ul style="list-style-type: none"> <li>◦ District Assignments   Infinite Campus (<a href="https://kb.infinitecampus.com/help/district-assignments">https://kb.infinitecampus.com/help/district-assignments</a>)</li> </ul> </li> <li>◦ Assign teachers to Departments ( <i>Census &gt; Staff &gt; District Assignments</i> )                             <ul style="list-style-type: none"> <li>◦ Make sure the department is added to the correct school and assignment</li> </ul> </li> </ul>	<input type="checkbox"/>

Task	Completed
<p><b>Assign/Update Tool/Calendar Rights</b> (<i>User Management &gt; User Groups &gt; Calendar/Tool Rights</i>)</p> <ul style="list-style-type: none"> <li>◦ Scheduling Tool Rights (<a href="https://kb.infinitecampus.com/help/tool-rights-scheduling">https://kb.infinitecampus.com/help/tool-rights-scheduling</a>)</li> <li>◦ Calendar Rights (+1 year) <ul style="list-style-type: none"> <li>◦ Add the future year to the + calendar user group</li> <li>◦ Remove any previous years in the + calendar user group</li> </ul> </li> </ul>	<input type="checkbox"/>

## Part 2

Task	Completed
<p><b>Update Course Information (in the future year calendar only)</b> (<i>Scheduling &amp; Courses &gt; Courses &gt; Add Course</i>)</p> <ul style="list-style-type: none"> <li>• Follow the <b>NCDPI Course Code Master List</b> (<a href="https://docs.google.com/spreadsheets/d/1kPfuckZeFMqckAKRKHdkM-RdGKEg6rrrTPH0pmTPZQI/edit?gid=0#gid=0">https://docs.google.com/spreadsheets/d/1kPfuckZeFMqckAKRKHdkM-RdGKEg6rrrTPH0pmTPZQI/edit?gid=0#gid=0</a>)</li> <li>• Mark courses no longer being used as inactive or delete them from the new school year calendar as needed at the school level <ul style="list-style-type: none"> <li>◦ <b><i>Be sure to be in the future school year when deleting courses.</i></b></li> </ul> </li> <li>• Add new courses that will be offered for the year from the course master selection</li> <li>• 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.) <ul style="list-style-type: none"> <li>◦ Attach Departments to Course Masters or Courses</li> <li>◦ <b>*Check the number terms, schedules and periods of the Course</b></li> <li>◦ Determine if the course can be requested by students in the Portal via Course Master level or Course level (Allow student requests)</li> <li>◦ Determine if the course can be requested by teachers via Course Master level or Course level (Allow teacher requests/recommendations)</li> <li>◦ <b>*Select the desired scheduling priority (if applicable)</b></li> <li>◦ 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.</li> </ul> </li> </ul> <p><i>*Note: Some course information can be viewed/updated using the <a href="https://kb.infinitecampus.com/help/course-planner-course-planner">Course Planner Tool</a> (<a href="https://kb.infinitecampus.com/help/course-planner-course-planner">https://kb.infinitecampus.com/help/course-planner-course-planner</a>).</i></p> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>

Task	Completed
<p><b>Establish Course Rules</b> (<a href="http://kb.infinitecampus.com/help/course-rules">http://kb.infinitecampus.com/help/course-rules</a>) (<i>Scheduling &amp; Courses &gt; Courses &gt; Course Rules</i>)</p> <ul style="list-style-type: none"> <li>If you are only changing existing schedules and not using course plans, this step can be skipped.</li> <li>Scheduling Rules (used with building and loading) - <a href="https://kb.infinitecampus.com/help/course-rules#scheduling-rules">Course Rules   Infinite Campus</a> (<a href="https://kb.infinitecampus.com/help/course-rules#scheduling-rules">https://kb.infinitecampus.com/help/course-rules#scheduling-rules</a>)</li> <li>Planning Rules (used with course plans) - <a href="https://kb.infinitecampus.com/help/course-rules#planning-rules">Course Rules   Infinite Campus</a> (<a href="https://kb.infinitecampus.com/help/course-rules#planning-rules">https://kb.infinitecampus.com/help/course-rules#planning-rules</a>)</li> </ul> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>
<p><b>Establish Student Constraints</b> (<i>Scheduling &amp; Courses &gt; Build Schedules &gt; Student Constraints Setup</i>)</p> <ul style="list-style-type: none"> <li><a href="https://kb.infinitecampus.com/help/student-constraints">Student Constraints   Infinite Campus</a> (<a href="https://kb.infinitecampus.com/help/student-constraints">https://kb.infinitecampus.com/help/student-constraints</a>)</li> <li>Set strict or not strict constraints between students</li> </ul> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>

## Part 3

Task	Completed
<p><b>Add Course Requests</b></p> <p>This is optional and can be used if using Teams in the scheduling process.</p> <p>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.</p> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>
<p><b>Requests &amp; Rosters</b> (<i>Scheduling &amp; Courses &gt; Scheduling &gt; Requests &amp; Rosters</i>)</p> <ul style="list-style-type: none"> <li><a href="https://kb.infinitecampus.com/help/requests-and-rosters">Requests and Rosters   Infinite Campus</a> (<a href="https://kb.infinitecampus.com/help/requests-and-rosters">https://kb.infinitecampus.com/help/requests-and-rosters</a>)</li> <li>Use this tool to add requests to students in mass.</li> <li><i>*Reminder: Check the "Include Inactive Students" checkbox to work with students in the future year.</i></li> </ul> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>

Task	Completed
<p><b>Walk-in Scheduler</b> (<i>Student Information &gt; General &gt; Schedule</i>)</p> <ul style="list-style-type: none"> <li>• <a href="https://kb.infinitecampus.com/help/walk-in-scheduler#Walk-InScheduler-AddRequests">Walk-In Scheduler   Infinite Campus</a> (<a href="https://kb.infinitecampus.com/help/walk-in-scheduler#Walk-InScheduler-AddRequests">https://kb.infinitecampus.com/help/walk-in-scheduler#Walk-InScheduler-AddRequests</a>)</li> <li>• Add requests to individual students</li> </ul> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>
<p><b>Run Reports</b></p> <p>Check course requests by using the reports below. Other reports may be used as well.</p> <ul style="list-style-type: none"> <li>• <b>Schedule Units Report</b> (<i>Scheduling &amp; Courses &gt; Reports &gt; Schedule Units Report</i>) <ul style="list-style-type: none"> <li>◦ <a href="https://kb.infinitecampus.com/help/schedule-units-report">Schedule Units Report   Infinite Campus</a> (<a href="https://kb.infinitecampus.com/help/schedule-units-report">https://kb.infinitecampus.com/help/schedule-units-report</a>)</li> <li>◦ Use this report to find under requested students</li> </ul> </li> <li>• <b>Requests Satisfied Report</b> (<i>Scheduling &amp; Courses &gt; Reports &gt; Requests Satisfied Report</i>) <ul style="list-style-type: none"> <li>◦ <a href="https://kb.infinitecampus.com/help/requests-satisfied">Requests Satisfied   Infinite Campus</a> (<a href="https://kb.infinitecampus.com/help/requests-satisfied">https://kb.infinitecampus.com/help/requests-satisfied</a>)</li> <li>◦ Use this report to see how many requests there are per course</li> </ul> </li> <li>• <b>Request Conflicts Report</b> (<i>Scheduling &amp; Courses &gt; Reports &gt; Request Conflict Report</i>) <ul style="list-style-type: none"> <li>◦ <a href="https://kb.infinitecampus.com/help/request-conflicts">Request Conflicts Report   Infinite Campus</a> (<a href="https://kb.infinitecampus.com/help/request-conflicts">https://kb.infinitecampus.com/help/request-conflicts</a>)</li> <li>◦ Use this report to see a list of possible conflicts with requests</li> </ul> </li> <li>• <b>Request Batch Report</b> (<i>Scheduling &amp; Courses &gt; Reports &gt; Request Batch Report</i>) <ul style="list-style-type: none"> <li>◦ <a href="https://kb.infinitecampus.com/help/request-batch">Request Batch Report   Infinite Campus</a> (<a href="https://kb.infinitecampus.com/help/request-batch">https://kb.infinitecampus.com/help/request-batch</a>)</li> <li>◦ This will print requests by students as one page per student</li> </ul> </li> </ul> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>

## Part 4

Task	Completed
<p><b>Scheduling Board</b> (<i>Scheduling &amp; Courses &gt; Scheduling &gt; Scheduling Board</i>)</p> <p>The scheduling board can be used to easily move sections as needed. Sections can also be updated manually in course/sections.</p> <ul style="list-style-type: none"> <li>• Copy trials to maintain previous schedules <ul style="list-style-type: none"> <li>◦ <a href="https://kb.infinitecampus.com/help/scheduling-board-trials-new">Scheduling Board Trials   Infinite Campus</a> (https://kb.infinitecampus.com/help/scheduling-board-trials-new)</li> </ul> </li> <li>• Set Scheduling Board Options <ul style="list-style-type: none"> <li>◦ <a href="https://kb.infinitecampus.com/help/scheduling-board-new#settings">Scheduling Board   Infinite Campus</a> (https://kb.infinitecampus.com/help/scheduling-board-new#settings)</li> </ul> </li> <li>• Set Scheduling Board build settings (max periods, max courses) <ul style="list-style-type: none"> <li>◦ <a href="https://kb.infinitecampus.com/help/scheduling-board-new#build-settings-side-panel">Scheduling Board   Infinite Campus</a> (https://kb.infinitecampus.com/help/scheduling-board-new#build-settings-side-panel)</li> </ul> </li> </ul> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>
<p><b>Staff Planner</b> (<i>Scheduling &amp; Courses &gt; Scheduling &gt; Staff Planner</i>)</p> <p>If you are only adjusting the current existing schedule, this step may be skipped.</p> <p>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.</p> <ul style="list-style-type: none"> <li>• <a href="https://kb.infinitecampus.com/help/staff-planner-staff-planner">Staff Planner   Infinite Campus</a> (https://kb.infinitecampus.com/help/staff-planner-staff-planner)</li> <li>• Add teacher course assignments</li> <li>• Assign rooms to teachers</li> <li>• Assign teams to teachers</li> <li>• Add Teacher constraints</li> <li>• Update individual teachers' max periods, max courses, etc. if different from the default</li> </ul> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>
<p><b>Course Planner</b> (<i>Scheduling &amp; Courses &gt; Scheduling &gt; Course Planner</i>)</p> <p>Use this tool to update individual courses or in mass. If sections are only be adjusted in an existing schedule, this step can be skipped.</p> <ul style="list-style-type: none"> <li>• <a href="https://kb.infinitecampus.com/help/course-planner-course-planner">Course Planner   Infinite Campus</a> (https://kb.infinitecampus.com/help/course-planner-course-planner)</li> <li>• Set sections to build, max students, load priority</li> <li>• Set number of sections to build per teacher</li> <li>• Set Placement restrictions</li> <li>• Set Scheduling Rules</li> </ul> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>

Task	Completed
<p><b>Adjust the Schedule</b> (<i>Scheduling &amp; Courses &gt; Scheduling &gt; Scheduling Board</i>)</p> <p>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.</p> <ul style="list-style-type: none"> <li>• <a href="https://kb.infinitecampus.com/help/scheduling-board-new#build">Scheduling Board   Infinite Campus</a> (<a href="https://kb.infinitecampus.com/help/scheduling-board-new#build">https://kb.infinitecampus.com/help/scheduling-board-new#build</a>)</li> <li>• Use the board view settings for highlights to see possible issues.</li> <li>• Drag and drop to move sections.</li> <li>• Make changes as needed in staff and course planner.</li> <li>• Run reports to check the build. <ul style="list-style-type: none"> <li>◦ Master Schedule Report (Scheduling &amp; Courses &gt; Reports &gt; Master Schedule Report)</li> <li>◦ Teacher Schedule Batch Report (Scheduling &amp; Courses &gt; Reports &gt; Teacher Schedule Batch Report)</li> <li>◦ Room Usage Report (Scheduling &amp; Courses &gt; Reports &gt; Room Usage Report)</li> </ul> </li> </ul> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>
<p><b>Load Students</b> (<i>Scheduling &amp; Courses &gt; Scheduling &gt; Scheduling Board</i>)</p> <p>Course requests must be added to student's records before using the load tool. If course requests were not used, this step can be skipped. Students can be added using Requests &amp; Rosters.</p> <ul style="list-style-type: none"> <li>• <a href="https://kb.infinitecampus.com/help/scheduling-board-new#load-all-courses">Scheduling Board   Infinite Campus</a> (<a href="https://kb.infinitecampus.com/help/scheduling-board-new#load-all-courses">https://kb.infinitecampus.com/help/scheduling-board-new#load-all-courses</a>)</li> <li>• <a href="https://kb.infinitecampus.com/help/scheduling-board-new#load-settings-side-panel">Set Load Settings - Scheduling Board   Infinite Campus</a> (<a href="https://kb.infinitecampus.com/help/scheduling-board-new#load-settings-side-panel">https://kb.infinitecampus.com/help/scheduling-board-new#load-settings-side-panel</a>)</li> <li>• Load by department, course, or run a full load.</li> <li>• Unload by department, course or run a full unload.</li> <li>• Lock rosters by department, course, section, or grade level to keep students in the section.</li> </ul> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>

Task	Completed
<p><b>Run Reports</b> (<i>Scheduling &amp; Courses &gt; Reports</i>)</p> <p>Use the reports below to see the load results for students' requests. If requests were not used, this step can be skipped.</p> <ul style="list-style-type: none"> <li>• <a href="https://kb.infinitecampus.com/help/schedule-units-report">Schedule Units Report   Infinite Campus</a> (https://kb.infinitecampus.com/help/schedule-units-report) <ul style="list-style-type: none"> <li>◦ Use this report to find under requested students.</li> </ul> </li> <li>• <a href="https://kb.infinitecampus.com/help/requests-satisfied">Requests Satisfied   Infinite Campus</a> (https://kb.infinitecampus.com/help/requests-satisfied) <ul style="list-style-type: none"> <li>◦ Use this report to see how many requests there are per course.</li> </ul> </li> <li>• <a href="https://kb.infinitecampus.com/help/request-conflicts">Request Conflicts Report   Infinite Campus</a> (https://kb.infinitecampus.com/help/request-conflicts) <ul style="list-style-type: none"> <li>◦ Use this report to see a list of possible conflicts with requests.</li> </ul> </li> <li>• <a href="https://kb.infinitecampus.com/help/request-batch">Request Batch Report   Infinite Campus</a> (https://kb.infinitecampus.com/help/request-batch) <ul style="list-style-type: none"> <li>◦ This will print requests by students as one page per student.</li> </ul> </li> </ul> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>
<p><b>Other Helpful Reports</b> (<i>Scheduling &amp; Courses &gt; Reports</i>)</p> <ul style="list-style-type: none"> <li>• <a href="https://kb.infinitecampus.com/help/staff-history-report">Staff History Report   Infinite Campus</a> (https://kb.infinitecampus.com/help/staff-history-report) <ul style="list-style-type: none"> <li>◦ Determine if any sections are without a primary teacher.</li> </ul> </li> <li>• <a href="https://kb.infinitecampus.com/help/seat-count">Seat Count Report   Infinite Campus</a> (https://kb.infinitecampus.com/help/seat-count) <ul style="list-style-type: none"> <li>◦ See the number of students per period.</li> </ul> </li> <li>• <a href="https://kb.infinitecampus.com/help/section-roster-report">Section Roster Report   Infinite Campus</a> (https://kb.infinitecampus.com/help/section-roster-report) <ul style="list-style-type: none"> <li>◦ See rosters for teachers as needed.</li> </ul> </li> <li>• <a href="https://kb.infinitecampus.com/help/schedule-batch-report">Schedule Batch Report   Infinite Campus</a> (https://kb.infinitecampus.com/help/schedule-batch-report) <ul style="list-style-type: none"> <li>◦ See individual student schedules.</li> </ul> </li> <li>• <a href="https://kb.infinitecampus.com/help/teacher-schedule-batch-report">Teacher Schedule Batch Report   Infinite Campus</a> (https://kb.infinitecampus.com/help/teacher-schedule-batch-report) <ul style="list-style-type: none"> <li>◦ See individual teacher schedules.</li> </ul> </li> </ul> <p><i>*Make sure the calendar context is future year.</i></p>	<input type="checkbox"/>
<p><b>Lock Scheduling Board</b> (<i>Scheduling &amp; Courses &gt; Scheduling &gt; Scheduling Board</i>)</p> <ul style="list-style-type: none"> <li>• The active trial is the visible schedule.</li> <li>• Lock the final trial. When the future year becomes the active year, the active trial will automatically lock. <ul style="list-style-type: none"> <li>◦ Users with tool rights can unlock the trial, but it will lock back once saved.</li> </ul> </li> <li>• Remove tool rights to the scheduling board when scheduling should be adjusted using course/sections and student's schedules.</li> </ul>	<input type="checkbox"/>

Task	Completed
<p><b>Fill Student Gaps</b></p> <p>Run Reports to identify gaps and/or issues</p> <ul style="list-style-type: none"> <li>• Student Gap Scheduler ( <i>Scheduling &amp; Courses &gt; Load Schedules &gt; Student Gap Scheduler</i> ) <ul style="list-style-type: none"> <li>◦ <a href="https://kb.infinitecampus.com/help/student-gap-scheduler">Student Gap Scheduler   Infinite Campus</a> (https://kb.infinitecampus.com/help/student-gap-scheduler)</li> </ul> </li> <li>• Schedule Gap Filler ( <i>Scheduling &amp; Courses &gt; Load Schedules &gt; Schedule Gap Filler</i> ) <ul style="list-style-type: none"> <li>◦ <a href="https://kb.infinitecampus.com/help/schedule-gap-filler">Schedule Gap Filler   Infinite Campus</a> (https://kb.infinitecampus.com/help/schedule-gap-filler)</li> </ul> </li> <li>• Requests Satisfied Report ( <i>Scheduling &amp; Courses &gt; Reports &gt; Requests Satisfied Report</i> ) <ul style="list-style-type: none"> <li>◦ <a href="https://kb.infinitecampus.com/help/requests-satisfied">Requests Satisfied Report   Infinite Campus</a> (https://kb.infinitecampus.com/help/requests-satisfied)</li> </ul> </li> <li>• Seat Count Report ( <i>Scheduling &amp; Courses &gt; Reports &gt; Student &gt; Seat Count Report</i> ) <ul style="list-style-type: none"> <li>◦ <a href="https://kb.infinitecampus.com/help/seat-count">Seat Count Report   Infinite Campus</a> (https://kb.infinitecampus.com/help/seat-count)</li> </ul> </li> <li>• Manually add alternates using the Walk in Scheduler</li> </ul>	<input type="checkbox"/>

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