

Batch Assignment Tool

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Batch Program Assignment Wizard Editor | Add Program Participation | Delete Program Participation | Edit Program Participation

Classic View: Program Administration > Batch Program Assignment Wizard

Search Terms: Batch Program Assignment Wizard

The **Batch Program Assignment Wizard** adds, deletes or modifies the selected flag, graduation program, academic program, program or program with sessions to (or from) the selected students' Flags, Programs (Student Information > Academic Planning), **or** Programs (Student Information > General) tools.

Students receiving a flag, graduation program, academic program, program assignment or program session are chosen by using filters or by selecting students using the batch add option. The selected flag, program or academic program is assigned as of the entered start date. A student can have multiple assignments of any program type other than graduation. Students are allowed only one graduation program assignment. If the student already has a graduation program assigned to them, it is overwritten when a new assignment is made.

Batch Program Assignment Wiza	rd ☆
Batch Assignment Tool	
The Batch Assignment tool adds, deletes, or modifies the iten Students can only be assigned one graduation program.	n selected in the Type field for the selected students(s).
Select Type	● Select Filter ○ Batch Add
	Select Filters (at least one)
Select Program A-G Pathway (Graduation)	Grade(s)
	Select one or more grade levels.
Select Mode	Ad Hoc Filter
Add Participation	Select an Ad Hoc Filter
O Delete Participation O Edit Participation	Scheduling Group/Team(s) (Optional)
Start Date End Date	Select one or more scheduling groups.
	Update
Batch I	Program Assignment Tool
Batch F	Program Assignment Tool

When assigning programs, students must meet the requirements of the program. For example, students assigned to a graduation program must have the appropriate cohort start and end year information associated with the selected graduation program.



Batch Program Assignment Wizard Editor

The following table defines the options available on the Batch Program Assignment Wizard.

Option	Definition
Select Type	This is a list of flags, graduation programs, academic programs, and other programs and related program sessions that can be assigned to students or non-students through the Census Program Participation tools. Graduation and academic programs are labeled as such.
Select Program Required	Indicates the program that is being assigned. The list of programs is pulled from the Programs tool. This list includes inactive programs as well as active programs. Only programs that do not have program sessions are listed here. When assigning Programs, Program Sessions, Graduation Programs and Academic Programs, only programs that are marked as District Wide and those programs linked to the calendar selected in the toolbar are available for selection. When assigning flags, all flags are available.
Display Sessions Occurring in Selected Calendar	 Indicates which Program Sessions display for student assignment. When marked, only those sessions occurring within the date range of the selected calendar in the Campus toolbar are available. When not marked, all program sessions display in the Selected Program Sessions dropdown. Active program sessions display at the top of the list; inactive program sessions display in red font. This only applies to Program Sessions.
Select Program Session Required	Indicates the session of the selected program that is being assigned. Only programs that are marked for Program Sessions are listed here. This field only displays when the Select Type field is set to Program Session.
Select Mode	Indicates whether the flag or program is being assigned (Add Participation), removed (Delete Participation) or modified (Edit Participation). When editing program participation, existing data can also be modified (when the Overwrite Existing Data checkbox is marked). When using Add Participation an additional checkbox is available for academic programs only labeled Only students with completed requirements. When this checkbox is marked, only students who have completed all of the requirements for an academic program will have that program assigned to them.



Option	Definition
Start Date <i>Required</i>	Entered date is the start date of the selected program or flag, or when the student is first enrolled/assigned in the program or program session. Dates are entered in <i>mmddyy</i> format, or use the calendar icon to select a date.
	This is required when adding program participation (but not when deleting or editing)
End Date	Entered date is the end date of the selected program or flag, or when the student ends enrollment/assignment in the program or program session. Dates are entered in <i>mmddyy</i> format, or use the calendar icon to select a date.
Exit Reason	Selection indicates the reason the student is ending participation in the program. These are assigned on the student's Program Participation tool and options are created in the Attribute Dictionary.
Status	Selection indicates the student's status in the Program Session. These are assigned on the student's Program Participation tool and options are created in the Attribute Dictionary.
Select Filter At least one type	of filter field needs to be populated.
Grades	Students in the selected grade levels will have flag or academic programs added, deleted or edited. Enter a grade level in the field to see matching results, or click in the field to choose from the available options.
Ad hoc Filter	When selected, a list of available ad hoc filters will display that will further narrow the list of students available. This field can be used in addition to the grade level selection or instead of the grade level selection. Only those students included in the filter have programs added, deleted or modified.
Scheduling Group/Team(s)	When selected, only those students assigned to the selected scheduling group are assigned the program, have the program deleted, or have their program assignment modified.
Batch Add	ents for program assignments without needing to create an ad hoc filter. This

Hand-select students for program assignments without needing to create an ad hoc filter. This option functions much like the Ad hoc Selection Editor functionality.



Option	Definition
Quick Search	 Enter or select data to return a list of matching student names. Use one or all of the available fields: Active today - Choose Yes (all active students as of the current date), No (all inactive students as of the current date), or Both (all active and inactive students as of the current date). Inactive students display in the Student List in red text, indicating their enrollment has ended (enrollment record for the selection school/year has an end date entered). Grade - Choose a specific grade level from the dropdown list. Only grades in the selected school are available for selection. Or, leave this set to All. Name - Enter the student's last name or part of the last name, and the student's first name or part of the first name. Use a comma to separate the last and first name. Entering "and" returns students whose last names begin with "and"; entering :"and, isa" returns students whose last name begins with "and" and whose first name begins with "isa." Sort - Determine how the list of students is sorted. Choose by Grade, Name (alphabetically by last name). The list of students below the Quick Search changes to only show those students who match the entered Quick Search criteria.
Student List	Instead of using the Quick Search fields, manually choose the students to include in the report by selecting the student names in the All Students list, then click the right-facing arrow. Their names move to the Selected Students column on the right. The students in the Selected Students list will have program information added, deleted or edited. Remove selected students from the right hand column by clicking the left- facing arrow. The student name returns to the All Students column.

The Editor also displays Summary information that lists the selected programs and related data as it is selected.



Batch Program	Assignment Wizard	1 ☆
Batch Assignment Tool		
The Batch Assignment too	ol adds, deletes, or modifies the item se	elected in the Type field for the selected students(s).
Students can only be assi	igned one graduation program.	
Select Type		— 🔍 Select Filter $^{\bigcirc}$ Batch Add
Program Session	\sim	
Select Program		Select Filters (at least one)
Reading Tutoring		Grade(s)
		Select one or more grade levels.
Select Program Session		Ad Hoc Filter
Display sessions active w Reading Helpers	vithin selected calendar date range	Select an Ad Hoc Filter
Reading Helpers	•	Scheduling Group/Team(s) (Optional)
Select Mode		
Add Participation		Select one or more scheduling groups.
O Delete Participation		
Edit Participation		
Start Date	End Date	
Exit Reason	Status	
	~	
		Update
Summary		
Program Information		
Program Name:	Reading Tutoring	Program Category:
Program Code: Description:		State Reported: No
Description.		
Program Session Informati	ion	
Occurrence:	Before school (B)	Hosted:
Frequency:	Weekly (WK)	Partnering Agency:
Location:	LeDer Antheny L	Program Manager:
Instructor: Start Date:	LaBar, Anthony J 06/01/2022	Max Participants: 15
End Date:	SOLO HEVEL	
Comments:		
Batch	Program Assignment T	Tool - Program Session Summary Information

Program Session Dates: When assigning program sessions, the entered start and end dates must be within the selected program session start and end dates.

Max Participants: When enrollment in a program session meets the entered Max Participant number, a pop-up message displays. Additional students can still be added to the program session, but be aware the enrollment has exceeded the entered value.

Graduation Programs: When assigning graduation programs, a warning message displays indicating any graduation program already assigned to a student will be overwritten with the new program. A student can only be assigned one graduation program at a time.



Depending on the amount of students selected when managing programs, the process to add or delete programs may take some time. Please be patient and wait for the confirmation that programs have been modified. Also consider choosing a smaller set of students.

Add Program Participation

Add Program Participation using the Select Filter Options

- 1. Select the program type to add from the **Select Typ**e dropdown.
- 2. Select the program to add from the **Select Program** dropdown.
- 3. If applicable, mark the **Display sessions occurring in selected calendar** checkbox.
- 4. Select the Add Participation mode.
 - 1. A checkbox that can be used to add **Only students with completed requirements** is available if you are adding participation for an academic program.
- 5. Enter the **Start Date** for when the student starts in the program.
- 6. Select the Select Filter radio button.
- 7. Enter the **Grade**(s) of the students, or select an **Ad hoc filter** from the dropdown list, or enter a **Scheduling Group/Team.**
- 8. Select the Update button. The selected program will be added to the students in the selected grade levels, ad hoc filters and scheduling teams. The Submit to Batch Option is made available when you have chosen to add participation for an academic program and marked the Only students with completed requirements checkbox.

A pop-up window that notes the total count of programs updated (or, how many students were assigned the program) displays when the Batch Program Assignment tool has completed. Click the OK button on this pop-up to continue.

Batch Program Assignment Wizard	☆
Patch Assignment Tool The Batch Assignment tool adds, deletes, or modifies the item se Students can only be assigned one graduation program.	elected in the Type field for the selected students(s).
Select Type Graduation Select Program Computer Science Pathway (Graduation) Select Mode Add Participation Delete Participation Edit Participation Start Date 06/01/2022	 Select Filter Batch Add Select Filters (at least one) Grade(s) (* 09) Ad Hoc Filter 9th Grade Computer Science Group * * Scheduling Group/Team(s) (Optional) Select one or more scheduling groups.
	Update

Add Program Participation using the Batch Add Options

- 1. Select the program type to add from the **Select Typ**e dropdown.
- 2. Select the program to add from the **Select Program** dropdown.
- 3. If applicable, mark the **Display sessions occurring in selected calendar** checkbox.
- 4. If applicable, select the **Program Sessions** from the dropdown list.
- 5. Select the Add Participation mode.
 - 1. A checkbox that can be used to add **Only students with completed requirements** is available if you are adding participation for an Academic Program.
- 6. Enter the **Start Date** for when the student starts in the program.
- 7. Select the **Batch Add** radio button.
- 8. Enter the **Quick Search** options, or select the students from the Student List manually by moving the desired students from the All Students column to the Selected Students column.
- Select the Update button. The selected program will be added to the selected students. The Submit to Batch Option is made available when you have chosen to add participation for an academic program and marked the Only students with completed requirements checkbox.

A pop-up window that notes the total count of programs updated (or, how many students were assigned the program) displays when the Batch Program Assignment tool has completed. Click the OK button on this pop-up to continue.



Batch Program Assignment Wiza	ard ☆	Stu
Batch Assignment Tool		
The Batch Assignment tool adds, deletes, or modifies the its Students can only be assigned one graduation program.		
Program Select Program Reading Enrichment Image: Select Mode Image: Add Participation Delete Participation	Select Filter Batch Add Quick Search: Grade: 09 Name: (last name, first name) Sort: Grade, Name All Students Selected Students	
C Edit Participation Start Date C6/01/2022 Exit Reason	All Students Selected Students 09 Holzer, Quincy #117778 09 Horeyer, Conn #117778 09 Horeyer, Conn #117778 09 For, Amani #117910 09 Horeyer, Tanveer #118083 09 Feyler, Caroline #126197 09 Hormada, Carrik #118090 09 Hexler, Anisely #117086 09 Hormada, Carrik #118088 09 Hexler, Anisely #117086 09 Hormada, Emar #118087 > 09 Hunter, Finn #118188 > 09 Huthracher, Naim #118248 > 09 Huther, Andrzej #118649 > 09 Jochern, Cynthia #118755 >	*
Summary Program Information Program Name: Reading Enrichment Program Code: Description: Description: Reading Enrichment program who would like to improve the skill and enjoyment of reading	ir reading	
Add Prog	ram Participation using Batch Add Options	

Delete Program Participation

Deleting graduation program participation deletes any associated planned courses for a student.

Delete Program Participation using the Select Filter Options

- 1. Select the type of program from the **Select Type** dropdown list.
- 2. Select the program to delete from the **Select Program** dropdown list.
- 3. If applicable, mark the **Display sessions occurring in selected calendar** checkbox.
- 4. Select the **Delete Participation** mode.
- 5. Select the **Select Filter** radio button.
- 6. Enter the **Grade**(s) of the students, or select an **Ad hoc filter** from the dropdown list, or enter a **Scheduling Group/Team.**
- 7. Select the **Update** button. The selected program is removed from the participants in the selected grade levels, ad hoc filters and scheduling teams.

A pop-up window will appear. For any flag or program type other than graduation programs this



pop-up window notes the total count of programs updated (or, how many students had the program deleted) when the Batch Assignment tool has completed. Click the OK button on this popup to continue. For graduation programs a pop-up window will appear with a warning stating "With the deletion of the student's graduation plan participation, all (# of courses) of their planned courses will also be deleted. Are you sure you want to continue?". You can click OK to proceed or Cancel to cancel.

Batch Program Assignment Wizard 🏠		
Satch Assignment Tool		
The Batch Assignment tool adds, deletes, or modifies the item s Students can only be assigned one graduation program.	elected in the Type field for the selected students(s).	
Select Type Graduation	Select Filter O Batch Add Select Filters (at least one)	
Select Program	Grade(s)	
Honors (Graduation)	Select one or more grade levels.	
Select Mode	Ad Hoc Filter	
O Add Participation	Remove from Honors Program	
 Delete Participation C Edit Participation 	Scheduling Group/Team(s) (Optional)	
Start Date End Date	Select one or more scheduling groups.	
	Update	
Delete Program Parl	ticipation using Select Filter Options	

Delete Program Participation using the Batch Add Options

Deleting graduation program participation deletes any associated planned courses for a student.

- 1. Select the type of program from the **Select Type** dropdown list.
- 2. Select the program to delete from the **Select Program** dropdown list.
- 3. If applicable, mark the **Display sessions occurring in selected calendar** checkbox.
- 4. Select the **Delete Participation** mode.
- 5. Select the **Batch Add** radio button.
- 6. Enter the **Quick Search** options, or select the students from the Student List manually by moving the desired students from the All Students column to the Selected Students column.
- 7. Select the **Update** button. The selected program will be added to the selected students.

A pop-up window will appear. For any flag or program type other than graduation programs this pop-up window notes the total count of programs updated (or, how many students had the program deleted) when the Batch Assignment tool has completed. Click the OK button on this popup to continue. For graduation programs a pop-up window will appear with a warning stating "With



the deletion of the student's graduation plan participation, all (# of courses) of their planned courses will also be deleted. Are you sure you want to continue?". You can click OK to proceed or Cancel to cancel.

Batch Program Assignment Wizard 🌣	St
Batch Assignment Tool	
The Batch Assignment tool adds, deletes, or modifies the item selected in the Type field for Students can only be assigned one graduation program. Select Type Program Select Program Reading Enrichment Select Mode Quick Search: Active today: Yes Grade: All Name:	Add (last name, first name) Name ✓ Selected Students 09 Cloutier, Trisha M#5300008 09 Gister, Amy #127567 19 Jeck, Hermione #118579 12 Lovick, Anush #122298 12 Lovick, Anush #122298 15271 1300 8
Upda	
Summary	
Program Information Program Name: Reading Enrichment Program Program Code: State R Description: Reading Enrichment program for students who would like to improve their reading skill and enjoyment of reading. State R	n Category: eported: No
Delete Program Participatio	n using Batch Add Options

Edit Program Participation

Edit Program Participation using the Select Filter Options

- 1. Select the type of program or program session from the **Select Type** dropdown list.
- 2. Select the program name from the Select Program dropdown list.
- 3. If applicable, mark the **Display sessions occurring in selected calendar** checkbox.
- 4. If the selected program has a Program Session, select the desired Program Session from the dropdpown list.
- 5. Select the program to edit from the Select Program dropdown list.
- 6. Choose the **Edit Participation** mode.
- If existing program assignment data should be overwritten, mark the Overwrite Existing Data checkbox. If existing data should not be overwritten, leave this checkbox unmarked.
- If modifying program start dates, enter the correct Start Date. When the Overwrite Existing Data checkbox is marked, determine if the entered date should be included in the overwritten data. If yes, mark the Include checkbox.
- 9. If modifying program end dates, enter the correct End Date. When the Overwrite Existing



Data checkbox is marked, determine if the entered date should be included in the overwritten data. If yes, mark the **Include** checkbox.

- 10. If modifying program Exit Reasons, select the desired option from the dropdown list. When the Overwrite Existing Data checkbox is marked, determine if this field should be included in the overwritten data. If yes, mark the Include checkbox.
- 11. If modifying program **Status**, select the desired option from the dropdown list. When the **Overwrite Existing Data** checkbox is marked, determine if this field should be included in the overwritten data. If yes, mark the **Include** checkbox.
- 12. Select the Select Filter radio button.
- 13. Enter the **Grade**(s) of the students, or select an **Ad hoc filter** (both a grade level and an Ad hoc filter can be selected) from the dropdown list, or enter a **Scheduling Group/Team.**
- 14. Select the **Update** button. The selected program is modified for the entered dates and reasons for the selected students.

A pop-up window that notes the total count of programs updated (or, how many students had program information modified) displays when the Batch Assignment tool has completed. Click the OK button on this pop-up to continue.



Batch Program Assignment Wizard	公
Batch Assignment Tool	
The Batch Assignment tool adds, deletes, or modifies the item se Students can only be assigned one graduation program.	elected in the Type field for the selected students(s).
Select Type Program Session Select Program Reading Tutoring Select Program Session Image: Display sessions active within selected calendar date range Reading Helpers Select Mode Add Participation Delete Participation Edit Participation Edit Participation Overwrite Existing Data Start Date Include End Date Include	 Select Filter Batch Add Select Filters (at least one) Grade(s) x 09 Ad Hoc Filter Select an Ad Hoc Filter Scheduling Group/Team(s) (Optional) Select one or more scheduling groups.
Exit Reason Include Status Include	Update
Summary Program Information Program Name: Reading Tutoring Program Code: Description:	Program Category: State Reported: No
Program Session Information Occurrence: Before school (B) Frequency: Weekly (WK) Location: Instructor: LaBar, Anthony J Start Date: 06/01/2022 End Date: Comments:	Hosted: Partnering Agency: Program Manager: Max Participants: 15

Edit Program Participation using the Batch Add Options

- 1. Select the type of program or program session from the **Select Type** dropdown list.
- 2. Select the program name from the Select Program dropdown list.
- 3. If applicable, mark the Display sessions occurring in selected calendar checkbox.
- 4. If the selected program has a Program Session, select the desired Program Session from the dropdpown list.
- 5. Select the program to edit from the Select Program dropdown list.
- 6. Choose the Edit Participation mode.
- If existing program assignment data should be overwritten, mark the Overwrite Existing Data checkbox. If existing data should not be overwritten, leave this checkbox unmarked.
- If modifying program start dates, enter the correct Start Date. When the Overwrite Existing Data checkbox is marked, determine if the entered date should be included in the overwritten data. If yes, mark the Include checkbox.



- If modifying program end dates, enter the correct End Date. When the Overwrite Existing Data checkbox is marked, determine if the entered date should be included in the overwritten data. If yes, mark the Include checkbox.
- 10. If modifying program **Exit Reasons**, select the desired option from the dropdown list. When the **Overwrite Existing Data** checkbox is marked, determine if this field should be included in the overwritten data. If yes, mark the **Include** checkbox.
- 11. If modifying program **Status**, select the desired option from the dropdown list. When the **Overwrite Existing Data** checkbox is marked, determine if this field should be included in the overwritten data. If yes, mark the **Include** checkbox.
- 12. Select the **Batch Add** radio button.
- 13. Enter the **Quick Search** options, or select the students from the Student List manually by moving the desired students from the All Students column to the Selected Students column.
- 14. Select the **Update** button. The selected program is modified for the entered dates and reasons for the selected students.

A pop-up window that notes the total count of programs updated (or, how many students had program information modified) displays when the Batch Program Assignment tool has completed. Click the OK button on this pop-up to continue.

Batch Assignment Tool			
The Batch Assignment tool ac	dds, deletes, or modifies the item	m selected in the Type field for the selected students(s).	
Students can only be assigne	ed one graduation program.		- 1
Select Type	D		
		○ Select Filter ● Batch Add	
Program Session	×]	Quick Search:	- 1
Select Program		Active today: Yes V	
Reading Tutoring	•	Grade: All V	
Select Program Session		Name: (last name, first name)	
Display sessions active within	in selected calendar date	Sort: Grade, Name V	
range			
Reading Helpers	•	All Students Selected Students	
Select Mode		09 Bhakta, Arjun #055460071 09 Campus, Connor #171750001 09 Bolander, Brady M #035460039 09 Feyler, Caroline #126197	^
Add Participation		09 Buick, Arlo #191900002 09 Hanner, Nikolai #115702	
O Delete Participation		09 Campus, Connor #171750001 09 Hasinger, Tesni #115995 09 Cloutier, Trisha M #53000008 09 Herb, Ellen #116811	
Edit Participation		09 Cutter, Christopher #035460003	
Overwrite Existing Da	ata	09 Deuser, Nicolaas N #035460040 09 El-Khatib, Issraa H. #055460043	
	End Date Include	09 Feyler, Caroline #126197 09 Gister, Amy #127567	
		09 Gutmuth, Takashi #115271	
	Status Include	09 Gymer, Shanika #115300 09 Gymer, Zoey #115298	
		09 Haber, Jael #115349	
		09 Haberer, Brodie #115357	_
		Update	
Summary			
Program Information Program Name:	Reading Tutoring	Program Category:	
Program Code:		State Reported: No	
Description:			
Program Session Information Occurrence:	Before school (B)	Hosted:	
	Weekly (WK)	Partnering Agency:	
Location:		Program Manager:	
	LaBar, Anthony J 06/01/2022	Max Participants: 15	
End Date:	00/01/2022		
Comments:			
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	Edit Progra	am Participation using Batch Add Options	
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Previous Versions

https://kb.infinitecampus.com/help/batch-assignment-tool-2227-2235