

# Getting Started with Requests and Rosters

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## What is Requests and Rosters?

Requests and Rosters is a batch tool that combines the functionality of five separate scheduling tools into one tool. Users can modify section rosters, enter requests for students, copy rosters, build rosters, set up section rosters, and much more.

## What do you want to do?

When using Requests and Rosters to perform tasks, ask yourself what needs to be done.

- 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?

With those answers, you can determine which View to use - Students or Courses.

## When can I 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.

## What Tool Rights are needed?

This is a powerful tool that can instantly modify section rosters and student schedules. Because of that, additional sub-rights have been added.

It is recommended that a limited number of personnel have access to it; also, limit its use after the start of the new school year.

Tool rights are cumulative; all rights associated with Read rights are included with Write rights.

The following provides additional information on what Tool Rights are needed for Requests and Rosters. See the [Tool Rights](#) article for more information about Tool Rights and how they function.

**User Tool Rights Editor**

▶ Reports	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Delete
▶ Reporting	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
▼ Scheduling & Courses	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
▼ Scheduling	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Scheduling Center	<input type="checkbox"/> All				
Course Planner	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Requests & Rosters	<input type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Modify Rosters	<input type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Can Overload Sections	<input type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Can Override Strict Student Constraints	<input type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Delete Rosters	<input type="checkbox"/> All	<input checked="" type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Scheduling Board	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
Staff Planner	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
▶ Courses	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
▶ Calendar Setup	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
▶ Build Schedules	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete
▶ Load Schedules	<input type="checkbox"/> All	<input type="checkbox"/> Read	<input type="checkbox"/> Write	<input type="checkbox"/> Add	<input type="checkbox"/> Delete

*Requests & Rosters Tool Rights*

Read Rights	Write Rights
<ul style="list-style-type: none"> <li>• Navigate to and view Requests and Rosters.</li> <li>• View Students View landing page.</li> <li>• View Courses View landing page.</li> <li>• View Course Section Side Panel.               <ul style="list-style-type: none"> <li>◦ View Roster.</li> <li>◦ Displays Close button.</li> </ul> </li> <li>• Only Read rights are needed for these sub-tool rights.               <ul style="list-style-type: none"> <li>◦ <b>Modify Rosters</b> - Displays Batch Edit Student Rosters and Batch Edit Course Rosters and access to update rosters.</li> <li>◦ <b>Can Overload Sections</b> - Allows students to be added to course sections that have met their Max Student number.</li> <li>◦ <b>Can Override Strict Student Constraints</b> - This allows students to be scheduled into sections where they may have a restraint with another student.</li> <li>◦ <b>Delete Rosters</b> - Allows roster records to be removed.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Access Batch Edit Student Requests and Batch Edit Course Requests.</li> </ul>

## Where do I?...

The following lists common tasks that were performed previously in the Roster Copy Wizard, the Manual Roster Builder, and other Scheduling tools, and information on how the same tasks are accomplished in Requests and Rosters.

Also see the [Requests and Rosters Videos](#) for a comparison of how tasks were previously accomplished and how to do that same task in Requests and Rosters.

## Section Roster Batch Edit

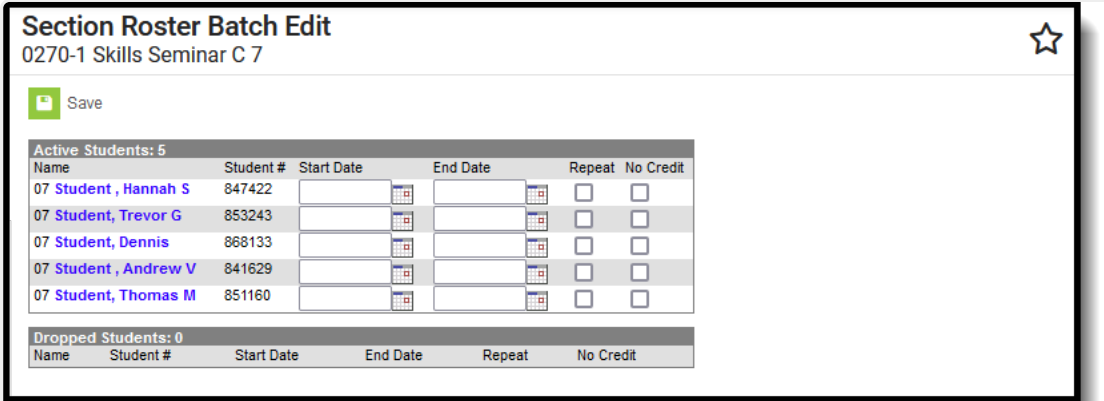
▶ [Click here to expand...](#)

### Previous Process

The Section Roster Batch tool provided a way to mass update the existing roster for the selected

course section, modifying the start and end dates for the students, determining whether the student was repeating the course and/or receiving credit for the course.

For some states, the Roster Batch Edit tool may have also included fields used in state reporting. A localized field is any field that is displays AFTER the No Credit checkbox.

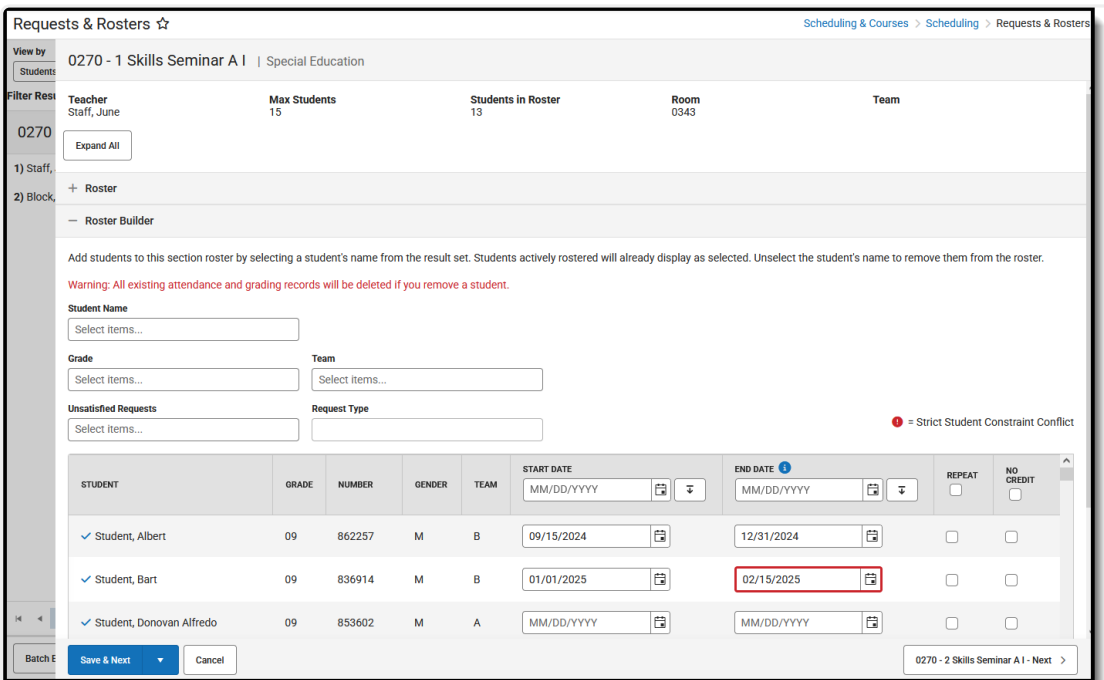


*Section Roster Batch Edit*

## New Process

In Requests and Rosters, this action is done using the **Courses** view. First, locate the Course Section by filtering for a specific Course Section. In the Roster Builder section of the Side Panel, students can be marked as Repeat or No Credit.

start and end dates for the scheduled students can be modified to something other than the default start and end dates of the term or the student's enrollment dates.



*Roster Builder Panel in Requests & Rosters*

Note that unselecting a student does NOT update the start/end date; unselecting a student REMOVES that student from the section.

## Request Wizard

▶ [Click here to expand...](#)

### Previous Process

The Request Wizard allowed the **creation of course requests** and **removal of course requests** based on a schedule team, an Ad hoc filter, existing course requests or from previous section rosters.

The screenshot shows the 'Request Wizard' interface with the following sections:

- Course Request Wizard**: This tool batch creates or removes course requests based off student sets or teams, roster data from a previous year, or from other existing requests. This error if a user tries to remove requests that do not exist.
- Select Mode**:
  - Create Requests
  - Remove Requests
- Select Grades**:
  - 06  07  08
- Select Additional Method to Filter Students**:
  - Filter on team or ad hoc set
  - Filter on existing Requests
  - Filter on Roster data from a prior year
- Select Courses for Requests**:
  - 1211 Standards Language Arts I 7
  - 1230 English 7
  - 1273 Sp Reading 7
  - 1311 Standards Language Arts I 8
  - 1330 English 8
  - 1373 Reading 8
  - 2101 Social 6
  - 2172 Sp Social Studies 6
  - 2201 SOCIAL 7
  - 2272 Sp Soc Studies 7
  - 2301 SOCIAL 8
  - 2372 Sp Soc Studies 8
  - 3101 Science 6
  - 3173 Sp Science 6
  - 3201 Science 7
  - 3273 Sp Science 7
  - 3301 Science 8

*Request Wizard - Create Requests*

### New Process

**Create Course Requests:** In the **Students** view, filtering the list of students by an Ad hoc Filter, a Team, a Grade Level, a previous course (and many more options) returns just that set of students. Requests can be added (or removed) as needed after filtering by using the **Batch Edit Student Requests** function.

Requests & Rosters ★

Scheduling & Courses > Scheduling > Requests & Rosters

View by: Students Courses Show Details OFF Filter X Reset

Filter Results: 6 out of 514 Students

Student, Mathias Daniel (07) #861658	Unsatisfied Requests: 0	Rosters: 0
Student, Giovanni (07) #866655	Unsatisfied Requests: 0	Rosters: 0
Student, Oliver Sullivan (07) #826690	Unsatisfied Requests: 0	Rosters: 0
Student, LeMessie Ted (07) #865485	Unsatisfied Requests: 0	Rosters: 0
Student, Jaddiel Omar (07) #862961	Unsatisfied Requests: 0	Rosters: 0
Student, Lidia Maybe (07) #866962	Unsatisfied Requests: 0	Rosters: 0

Batch Edit Student Requests Batch Edit Student Rosters

**Student Filter**

Student Name  
Select items...

Filter by Ad Hoc  
No Filter

Unsatisfied Requests  
Select items...

Request Type  
[Dropdown]

Special Education  
 Inactive Students

Calendar  
The following filter options will be determined by the selected calendar.  
2023-24 Middle School

Schedule Structure  
Main

Course Roster  
0106 Study 6

Section Roster  
1

Grade Level(s)  
Select items...

Team  
Close

Student Filter Options in Requests & Rosters

**Remove Course Requests:** This can be done in either the **Students** view or the **Courses** view. In the **Students** view, the **Batch Edit Student Requests** provides the option of removing course requests per student for selected courses.

Requests & Rosters ★

View by **Batch Edit Student Request Information**

filter Results 6 student records will be affected

Filter the result set using the fields below.  
Add or remove a request by selecting the course name from the filtered list.

Course Number or Name Department

Select items... Select items...

COURSE	DEPARTMENT
✓ 0000001 Pickleball	Activities
✓ 0009 Life Skills C	Special Education
0000 Advisory	Home Room - MS
0057 Recreation and Leisure	Physical Education
0101 Skills and Strategies A 6	Special Education
0102 Skills and Strategies B 6	Special Education
0105 Skills and Strategies E 6	Special Education

Batch Edit

*Remove Student Requests in Students View*

In the Courses view, the **Batch Edit Course Requests** function allows removal of course requests per course for selected students.

Requests & Rosters ★

View by: Students

Batch Edit Course Request Information

Use filter: 92 course records will be affected.

0000 Filter the result set using the fields below.  
Add or remove a request by selecting the student name from the filtered list.

0000 Student Name  
Select items...

0009 Grade Team  
Select items... Select items...

0057 Unsatisfied Requests Request Type  
Select items...

STUDENT	GRADE
Student, Adam	07
Student, Asher	07
Student, Levi	07
Student, Matthew	08
Student, Nathan	08
Student, Oliver	08
Student, Samuel	07

Batch Edit Add Remove Cancel

*Remove Course Requests in Courses View*

## Roster Copy Wizard

▶ [Click here to expand...](#)

### Previous Process

The Roster Copy tool copied the students enrolled in one section of a course in one calendar to a section of a course in another calendar. This was helpful for elementary schools, where the kindergarten class with Mr. Jones is now in first grade with Ms. Smith. This was also helpful for middle school scheduling where the 6th grade cohort was in homeroom A, Art A, English A, etc.



**Roster Copy Wizard** ☆ Scheduling & Courses > Load Schedules > Roster Copy Wizard

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**Roster Copy Wizard**

This tool will copy some or all of the students from one class to another. If the student already exists in the destination class, they will not be duplicated, and student be copied. Only students that are enrolled in the destination calendar will be copied.

<b>Source Calendar</b>	<b>Destination Calendar</b>
2023-24 Plymouth Middle School	24-25 Plymouth Middle School
<b>Source Schedule Structure</b>	<b>Destination Schedule Structure</b>
Main	Main
<b>Source Course</b>	<b>Destination Course</b>
0106 Study 6	0107 Study 7
<b>Source Section</b>	<b>Destination Section</b>
0106-1 Hernandez, Jennifer L	0107-1 Hernandez, Jennifer L

**RUN**

*Roster Copy Wizard*

## New Process

Using the **Students** view, in the Filter options, locate the Course and Section from the previous or current calendar to have a list of students that were/are enrolled in that section.

**Requests & Rosters** ☆ Scheduling & Courses > Scheduling > Requests & Rosters

View by: **Students** Courses  OFF  Filter

Show Details

Filter Results: 6 out of 514 Students

Student, Mathias Daniel (07) #861658	Unsatisfied Requests: 0	Rosters: 0
Student, Giovanni (07) #866655	Unsatisfied Requests: 0	Rosters: 0
Student, Oliver Sullivan (07) #826690	Unsatisfied Requests: 0	Rosters: 0
Student, LeMessie Ted (07) #865485	Unsatisfied Requests: 0	Rosters: 0
Student, Jaddiel Omar (07) #862961	Unsatisfied Requests: 0	Rosters: 0
Student, Lidia Maybe (07) #866962	Unsatisfied Requests: 0	Rosters: 0

1

**Student Filter**

Student Name:

Filter by Ad Hoc:

Unsatisfied Requests:

Request Type:

Special Education

Inactive Students

Calendar: The following filter options will be determined by the selected calendar.

2023-24 Middle School

Schedule Structure:

Course Roster:

Section Roster:

Grade Level(s):

Team:

*Students View - Copy Rosters*

Then, using the **Batch Edit Student Rosters**, locate the Course to add the students to, and select which Section to copy the students to.

Requests & Rosters Scheduling & Courses > Scheduling > Requests & Rosters

View by: Batch Edit Student Roster Information

Filter Results: 6 student records will be affected

Student: Filter the result set using the fields below. Add or remove students to a roster by selecting the course and section from the filtered list.

Unsatisfactory: **Warning: All existing attendance and grading records will be deleted when a student is removed.**

Student: Course Number or Name: 0107 Study 7 Department: Select Items...

Unsatisfactory: Teacher: Select Items... Team: Select Items... [Select All] [Unselect All]

COURSE	DEPARTMENT	SECTION	TEACHER	TEAM	START DATE	END DATE
✓ 0107 Study 7	Other	1	Staff, Jennifer L		month/day/year	month/day/year

Copy Rosters Process in Requests and Rosters

# Manual Roster Builder

▶ [Click here to expand...](#)

## Previous Process

The Manual Roster Builder tool allowed the manual creation of section rosters for specific courses or grade levels or groups of students.

Manual Roster Builder

## New Process

In Requests and Rosters: From the **Courses** view, select one of the course's sections. Expand the **Roster Builder** area to modify the roster of students.

View by: 0000 Advisory - 2 | Administration

Students

Use filter: Teacher Staff, Lisa Max Students 30 Students in Roster 20 Room 0342 Team A

0000

+ Roster

1) Staff. - Roster Builder

2) Staff.

3) Staff. Add students to this section roster by selecting a student's name from the result set. Students actively rostered will already display as selected. Unselect the student's name to remove them from the roster.

4) Staff. **Warning: All existing attendance and grading records will be deleted if you remove a student.**

5) Staff. Student Name

6) Staff.

7) Staff. Grade  Team

8) Staff.

9) Staff. Unsatisfied Requests  Request Type

10) Staff.

STUDENT	GRADE	NUMBER	GENDER	TEAM	REPEAT	NO CREDIT
<input checked="" type="checkbox"/> Student, Amber	09	866000	F	A	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Student, Natalie	09	835818	F	A	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Student, Alicia	09	834605	F	A	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Student, Kayla	09	868884	F	A	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Student, Kevin	09	831175	M	A	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Student, Randy	09	828743	F	A	<input type="checkbox"/>	<input type="checkbox"/>

Batch E

*Requests & Rosters - Build a Roster*

## Roster Setup


▶ [Click here to expand...](#)

## Previous Process

The **Roster Setup** tool listed the students who are currently in the section and allowed users to create a roster for the section by selecting a student's name from the list or by copying from another section.

### Section Roster Setup ☆

0057-1 Recreation and Leisure Teacher: Staff, Charlie C

 Save Student List and/or Copy Section

Copy student from this section: 0000 Advisory-22

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**Current Roster (0/34)**

Click on a student to remove from list.

Show Students in this grade only: 07

Student, Amber A(07) 845193

Student, Ashley A(07) 843022

Student, Beth C(07) 868574

Student, Brian (07) 858127

Student, Makaila V(07) 857306

Click on a student to add to section.

Warning: All existing grading scores and attendance records for this class will be deleted if you remove a student.

Note: Inactive students are highlighted in red in the Current Roster list. Use the walk-in scheduler to schedule inactive students into this section.

Path: Index > Student Information > General > Schedule Tab > Walk-in Scheduler

Roster Setup Tool

## New Process

From the **Students** view, use the **Filter** options to narrow the list of students to those who are currently scheduled into a particular course and section, e.g., those who are in Homeroom Section 2 with Mr. Doug, to also be scheduled into the same Science class with Mr. Kyle.

Requests & Rosters Scheduling & Courses > Scheduling > Requests & Rosters

View by: **Students** Courses Show Details Filter Reset

Filter Results: 11 out of 514 Students

Student, Michael (07) #866361

Unsatisfied Requests: 0      Rosters: 3  
 0000-2 Advisory      Staff, Doug  
 0000001-102 Pickleball      Staff, Jana  
 1208-1 Reading 7      Staff, Jennifer

Student, Nathan (07) #846553

Unsatisfied Requests: 0      Rosters: 3  
 0000-2 Advisory      Staff, Doug  
 0000001-102 Pickleball      Staff, Jana  
 1208-1 Reading 7      Staff, Jennifer

Student, Oliver (07) #842303

Unsatisfied Requests: 0      Rosters: 3  
 0000-2 Advisory      Staff, Doug  
 0000001-102 Pickleball      Staff, Jana  
 1208-1 Reading 7      Staff, Jennifer

1

Batch Edit Student Requests    Batch Edit Student Rosters    ↕

**Student Filter**

Filter by Ad Hoc  
No Filter

Unsatisfied Requests  
Select items...

Request Type  
Select items...

Special Education

Inactive Students

Calendar  
The following filter options will be determined by the selected calendar.  
24-25 Plymouth Middle School

Schedule Structure  
Main

Course Roster  
0000 Advisory

Section Roster  
2

Grade Level(s)

Close

Student Filter Options

Using the **Batch Edit Student Roster** option, search for the Science course, select it, then select Section 2. Those students in Homeroom Section 2 will be placed in Science Section 2.

Requests & Rosters Scheduling & Courses > Scheduling > Requests & Rosters

View by: **Students** **Batch Edit Student Roster Information**

Filter Results: 11 student records will be affected

Filter the result set using the fields below.  
Add or remove students to a roster by selecting the course and section from the filtered list.

**Warning: All existing attendance and grading records will be deleted when a student is removed.**

Course Number or Name: 3201 Science 7      Department: Select items...

Teacher: Select items...      Team: Select items...      Select All Unselect All

COURSE	DEPARTMENT	SECTION	TEACHER	TEAM	START DATE	END DATE
✓ 3201 Science 7	Science	2	Staff, Kyle		month/day/year	month/day/year

Batch Edit Student Roster Information