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Overview
The new enhanced Pre-Loader is now available in the admin area for all customers in all environments. This document provides a summary and detailed user guide for the new enhanced Pre-Loader.

Enhanced Pre-Loader Summary
What: The course Pre-Loader allows you to pre-populate student course lists in Schedule Planner. We have enhanced this module with three new features: required courses, audit history and breaks.

Where: A link to the new Pre-Loader is located at the top of the existing Pre-Loader page:

*Note: You will be asked to login again when accessing the new Pre-Loader as it is located in the new Admin Area which will be fully released later in Summer 2017.

How: Advisors will access the Pre-Loader and be able to walk through an easy 4-step process.

1. Select the Courses to pre-load and optionally indicate one or more courses as required.
2. Select the Breaks to pre-load.
3. Add the Student ID’s associated with the pre-load session.
4. Review and Confirm!
Courses

What: By marking courses as Required the pre-loaded courses are unable to be deleted by students and are displayed with a “required” marker next to them. This ensures that required, pre-loaded courses are included in students’ schedule results. Students are still able to de-select a required course just in case there are no schedules available with that required course. Students receive multiple warnings throughout schedule planner if they do indeed de-select a required course:

a. Upon de-selecting the required course, a warning in a modal window will appear that forces the student to acknowledge the de-selection of a required course.
b. Every time a schedule is generated without a required course, warnings appear on the home screen.
c. When viewing any schedule missing a required course, a warning is displayed at the top.
d. When sending a schedule to the shopping cart, students must acknowledge a warning about missing required courses.

Breaks

What: Administrators can pre-load break times for when students are unavailable to attend class. When students sign into the schedule planner, their breaks will be pre-populated. While the breaks will be pre-loaded, they cannot be marked as required.

Student IDs

What: Administrators will load the Student IDs that are associated with the pre-loaded courses and breaks.

Review and Confirm

What: The final step in the process for the administrator to review and confirm the Pre-Load. If a student already has courses or breaks in schedule planner, the pre-loaded session will append any missing courses/breaks to that students’ course and break list.

Audit History & Undo Pre-Load Session

What: Administrators can now see a summary of all Pre-Load sessions. The Audit History page will display the date created, creator, term, students, which courses and breaks were pre-loaded, and the status. Coming in July 2017, administrators will have the ability to “undo” a pre-loaded session and remove all pre-loaded courses and breaks for the students in that pre-load session.
Enhanced Pre-Loader Detailed User Guide

Overview

**How:** Advisors will access the Pre-Loader and be able to walk through an easy 4-step process.
1. Select Courses
2. Select Breaks
3. Add the Student IDs
4. Review and Confirm!

Courses

**How:** On the left-hand side of the screen, select the Term, Subject, and Course and hit the “Add Course” button. If you would like a student to be unable to delete a course, check the “required” check box on the right-hand side of the page. Once all courses have been added, click “next”.

Breaks

**How:** On the left-hand side of the page, add the break name, start and end time, days of the week, and then click “add break”. The break will appear on the right-hand side of the page. Once all breaks have been added, click “Next”.
Student IDs

How: Create a single column CSV file of Student IDs and upload on the left-hand side of the screen. Once uploaded, click “Next”.
Review and Confirm

**How:** After the courses, breaks, and student IDs have been added the administrator will review and confirm. If changes are needed, they can select “Edit” and it will bring them back to the courses, breaks, or Student ID upload page. Once the Pre-Load is confirmed, click “Pre-Load!”.

Audit History & Un-Do Pre-Loader Session

**How:** From the Audit History page the administrator will be able to view a summary of the details, download a list of students affected, and undo what was pre-loaded.

To download the list of students, click “Download List” under the student column.

To undo what was pre-loaded, click “Undo Pre-Load” under the status column. A warning box will appear and the administrator must check the checkbox before proceeding. This action will be logged under the status column. (Undo Functionality coming in July 2017)
<table>
<thead>
<tr>
<th>DATE</th>
<th>CREATOR</th>
<th>TERM</th>
<th>STUDENTS</th>
<th>DETAILS</th>
<th>STATUS</th>
</tr>
</thead>
</table>
| 9/20/16    | Mary Beth | Spring 2017 | 100 Students Download List | ACC 101 - Accounting Principles I  
BIO 100 - Introductory Biology  
MATH 102 - Calculus I  
Team Practice - MTWThF 8:00am to 10:00am | Completed  
Undo Pre-Loader |
| 9/1/16     | Joe Smith | Spring 2017 | 100 Students Download List | ACC 101 - Accounting Principles I  
BIO 100 - Introductory Biology  
Staff Meeting - M 6:00pm to 8:00pm  
Honors students who have the same work schedule | Undo Pre-Loader  
By Mary Beth on 9/20/16 at 5:30pm |

**Undo Pre-Loader**

This will cause courses and breaks to suddenly disappear from student's desired course and break lists which can be confusing. Please confirm this is the action you want to take.

I understand that I am removing ACC-101, BIO-100, and Staff Meeting from the desired course and break lists of 100 students.

[Cancel]  [Undo Pre-Loader]
How Do Required Courses Behave in Schedule Planner?

Required courses cannot be deleted in schedule planner, however, they can be unselected manually. If unselected, a barrage of warnings are presented to students at multiple points throughout the schedule planner experience. The reason we allow students to uncheck courses is, in some cases, there could be no schedules available with that required course. If that was the case, the student would always receive zero schedules generated and not be able to use the schedule planner application to plan and register. Below you will can see how the required courses will appear and behave from the student prospective:

Upon unselecting a required course, the student is presented with the following warning in a popup they must acknowledge:
When generating schedules without a required course, a warning is always shown on the home page:

![Warning on home page](image1)

When viewing any schedule that is missing a required course, a warning is displayed at the top of the schedule:

![Warning on schedule](image2)
Finally, upon clicking send to cart (if the student has unselected a required course) the student will receive another warning: