

Counselor Assignment

Counselors can be mass-assigned using Registration Assignment.

Registration > Utilities > Registration Assignment

Shown below are two ways in which counselors can be assigned.

1. If you are assigning counselors by grade, fill in the fields as follows:

The screenshot shows the 'Registration Assignment' form. Annotations with yellow arrows point to specific fields:

- Pick your building**: Points to the 'Building*' dropdown menu.
- Pick "Counselor" or "Next Year Counselor" as appropriate**: Points to the 'Field*' dropdown menu.
- Set this to 1000**: Points to the 'Maximum Students Per Value' input field.
- Pick the counselor**: Points to the 'Values' input field.
- Enter the grade**: Points to the 'Grade' dropdown in the filter table.
- Pick "Demographic" or "Next Year Demographic" as appropriate**: Points to the 'Area' dropdown in the filter table.


The form includes a 'Prompts' section with 'Building*', 'Field*', and 'Create a New Program Record'. It also has a filter table with columns: Area, Field Name, Condition, and Value. The table shows two rows: 'Demographic' with 'Grade' and '09 - Ninth Grade', and 'Demographic' with 'Current Status' and 'Active'.

Click Load Records  to view the filter result.

A list of students will display showing the current setting and the new setting.

The screenshot shows a table titled 'Selected Students' with the following columns: Student ID, Name, Building, Grade, Status, Current Counselor, and New Counselor. The table contains three rows of student data, all from '217 - Huntingtown High School' and '09' grade, with 'Active' status. The 'Current Counselor' is 'Gall, Tina' and the 'New Counselor' is 'Anderson, D.J.'.

Students that you do not want this counselor assigned to can be removed by checking the box to the left of the Student ID. Once all desired remove boxes have been checked, click

 **additional options** and choose **Re-model**, which will take them off the list. You can repeat this process as many times as necessary. When you are satisfied with the list

Click Run  to perform the mass update.

Repeat this process for other counselors as needed.

Counselor Assignment

2. If you are assigning counselors by student's last name (for example, to choose students with last name starting with 'A' through 'L'), fill in the fields as follows:

Registration Assignment

Pick your building

Pick "Counselor" or "Next Year Counselor" as appropriate

Set this to 1000

Pick the counselor

Enter the range of values for the last name (this example will select students with last names starting with A-L)

Pick "Demographic" or "Next Year Demographic" as appropriate

Actions	AND/OR	#	Area	Field Name	Condition	Value
		1	Demographic	Last Name	>=	A
	AND	2	Demographic	First Name	<	M
	AND	3	Demographic	Current Status	=	Active
	AND	4				

Click Load Records to view the filter result.

A list of students will display showing the current setting and the new setting.

Selected Students							
Number of records found: 973							
	Student ID	Name	Building	Grade	Status	Current Counselor	New Counselor
<input type="checkbox"/>			217 - Huntingtown High School	10	Active	Gall, Tina	Anderson, D.J.
<input type="checkbox"/>			217 - Huntingtown High School	12	Active	Gall, Tina	Anderson, D.J.
<input type="checkbox"/>			217 - Huntingtown High School	11	Active	Gall, Tina	Anderson, D.J.
<input type="checkbox"/>			217 - Huntingtown High School	11	Active	Gall, Tina	Anderson, D.J.
<input type="checkbox"/>			217 - Huntingtown High School	10	Active	Gall, Tina	Anderson, D.J.
<input type="checkbox"/>			217 - Huntingtown High School	09	Active	Gall, Tina	Anderson, D.J.
<input type="checkbox"/>			217 - Huntingtown High School	10	Active	Gall, Tina	Anderson, D.J.

Students that you do not want this counselor assigned to can be removed by checking the box to the left of the Student ID. Once all desired remove boxes have been checked, click

additional options and choose **Re-model**, which will take them off the list. You can repeat this process as many times as necessary. When you are satisfied with the list

Click Run to perform the mass update.

Repeat this process for other counselors as needed.