



SMS Scheduling

Secondary Schools

Grades 6-12

SMS Version 6.3

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SMS Secondary School Scheduling

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- A – Student Course Requests
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SMS Scheduling Check List

Task	Reference	Notes	Date & Initials
Create Planning Calendar	p. 1		
Check Room Setup	p. 2		
Check Staff Setup	p. 3 & Appendix B		
Check Course Setup	p. 3		
Set Scheduling Group(s)	p. 5		
Set Scheduling Term Sets	p. 5		
Set Day Pattern	p. 7		
Set Bell Schedule(s)	p. 8		
Set Meeting Patterns	p. 10		
Set Course Offerings and Meeting Patterns for all courses	p. 13		
Enter Student Course Requests	p. 19 & Appendix A	Verify that all students have correct number of requests. Must be completed <u>prior to</u> scheduling training.	
Configure Student Loading Rules	p. 13		
Create Master Schedule	p. 19 & Appendix E		
Set Student Loader Options	p. 20 & Appendix D		
Load Students	p. 20		
Modify Master Schedule (as needed)			
Modify Student Schedules (as needed)			
Complete Master Schedule and all student schedules		Prior to last week of school.	
Print reports for year-end clearance	Appendix H	Must be completed prior to principal clearance.	
Select Planning Schedule to be used for SY 2006/2007		Must be completed prior to principal clearance.	

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SMS Secondary School Scheduling

Introduction

Although SMS allows for some very creative scheduling, it is **very strongly** recommended that you **keep your schedule as simple as possible**. Some of the options in the program will not work in K-12 Planet. This is a program that allows student information such as marks and attendance to be uploaded and made available to parents. It will also be very important for next year because we will be able to calculate daily absences from period attendance. This process may not work if you have a very complicated schedule. If you want to follow anything other than a relatively standard schedule, please check with your district SMS ET or the SMS team at the area office first.

Steps must be followed in order. Many processes will not work if prior processes have not been completed correctly.

Scheduling Groups – At least one scheduling group is required. Most secondary schools should have **only one** scheduling group. A scheduling group is a set of students who have the same bell schedule.

Term Sets – Two are needed for all schools. Schools that offer quarter courses will need three term sets. These term sets are standard for DoDEA. **Use the names and codes shown in this document.**

Day Pattern – Keep it as simple as possible. A two-day block schedule, or a modified block schedule, with all classes meeting one day a week is easy. **Using the naming conventions shown in this document is strongly recommended.**

Bell Schedules – Try to use **only one**, even if you have different scheduling groups. This is important for period to daily attendance conversion as well as the use of *K-12 Planet* later. If classes change at the same time every day, you only need **one bell schedule**.

Meeting Patterns – Keep the names easy and logical. They sort alphabetically. Again, **it is strongly recommended that you follow the naming conventions used in this document.**

Lunch – If all students in the school eat at the same time, lunch should **not** be a part of the schedule. If you have multiple lunch periods, then lunch should be treated as a scheduled class. There are three different codes and descriptions available for lunch. If you need them, let the area office know how many different lunch times you have.

The SMS setup for scheduling is very important. If you have any questions about any of these items, please contact your district SMS ET or a member of the SMS team at your area office for assistance **early in the process**.

I. Create a Planning Calendar

Click on *School Setup* in the *Admin* section of the menu. Then click on *School Calendars* in the *Calendar* section of the screen. Click on *Actions*, and then click on *Add*

Calendar. Change the top line to look exactly like the example shown below. These are the start and end dates for schools that follow the standard DoDEA calendar. If your school has a different calendar, use the correct dates for your school. Be sure to start with the first day that teachers return to duty, and include **two** days **after** the teacher work day at the end of the second semester. This is needed for easy marks input. When finished, click *OK*.

<input type="checkbox"/>	*School calendar name	*Start (mm/dd/yyyy)	*End (mm/dd/yyyy)	Associated District Calendar	Type	Work with
<input type="checkbox"/>	2006-2007	08/23/2006	06/17/2007	2006-2007	Planning	<input checked="" type="radio"/>
<input type="checkbox"/>	2005-2006	08/23/2005	06/17/2006	2005-2006	Active	<input type="radio"/>
<input type="checkbox"/>	2004-2005	08/25/2004	06/17/2005	2004-2005	Historical	<input type="radio"/>

To work in the *Planning Calendar*, start from your *Home* screen. Click *Actions*, and then click *Switch Calendar*. Click the radio button at the right end of the line for the calendar that you want to use, and then click *OK*. At the present time we only have the *Active* calendar, which is the current year, and the *Planning* calendar, which is for the next school year. When you are working in SMS, be sure that you are in the correct calendar. **If you are in the *Planning* calendar, there will be a green box in the upper left corner of the screen labeled *Planning Calendar*.**



II. Planning Schedule

Only the principal or district ET should have the right to create, or change, a *Planning Schedule*. This is necessary to prevent problems caused by people inadvertently working in different planning schedules. You must be in the *Planning Calendar* to perform either of these actions. Although you can only have one *Planning Calendar*, it is possible to have multiple *Planning Schedules*. However, the number of schedules should be limited to what is actually needed.

By default, there will be a planning calendar named 2006-2007. It will automatically contain all of the courses, rooms, and staff that you have in your database for the current year. All *Room*, *Staff*, and *Course Setup* information, as well as student course requests should be entered in the **default** *Planning Schedule*. The *Room*, *Staff*, and *Course Setup* data will be common to all *Planning Schedules*. The *Student Course Requests* may be copied from one to another.

A. Room Setup

The default Planning Schedule will contain the rooms and buildings that you have been using this year. **Any changes made to building and rooms will also affect the current year.** Therefore, you should probably not delete buildings and/or rooms at this time. You may add them, if they are needed for next year.

B. Staff Setup

The staff list will also be carried over. You can delete *Place Holders*, if you still have them. You cannot delete other staff members because they are also used in the *Active Calendar*. However, you should **delete** the *Preferred Courses* and *Room Preferences* for any teachers who are not returning. Create *Place Holders* for new teachers.

See Appendix B for detailed *Staff Setup* information.

C. Course Setup

The courses that you requested last year will be carried forward to the new year. A few courses have been dropped by DoDEA. They will be removed. The unweighted AP courses will also be removed until school starts.

Check the list of approved courses from DoDEA. Note the course lengths. This is very important. Course descriptions for most courses are available on the DoDEA web site. Do not just pick a title because it sounds good. **Check the description.** The material taught in the course must be that described in the DoDEA course description.

Some courses that may be offered for 18 or 36 weeks exist in two versions, eg. Ceramics (36 weeks) and Ceramics S (18 weeks). A school may offer only **one** of these two courses. It is the same course – just a long and a short version. A student may **not** take both of them because they are not repeatable. It is **very strongly recommended** that you select only the **year-long** version of these courses. In that way, a student may take the course for the entire year. Do **not** select the “S” version unless the course will only be taught during a single semester, and not offered to any student during the other semester.

It is always easy to add courses, and difficult to remove them. Start with a short list, and add to it if necessary.

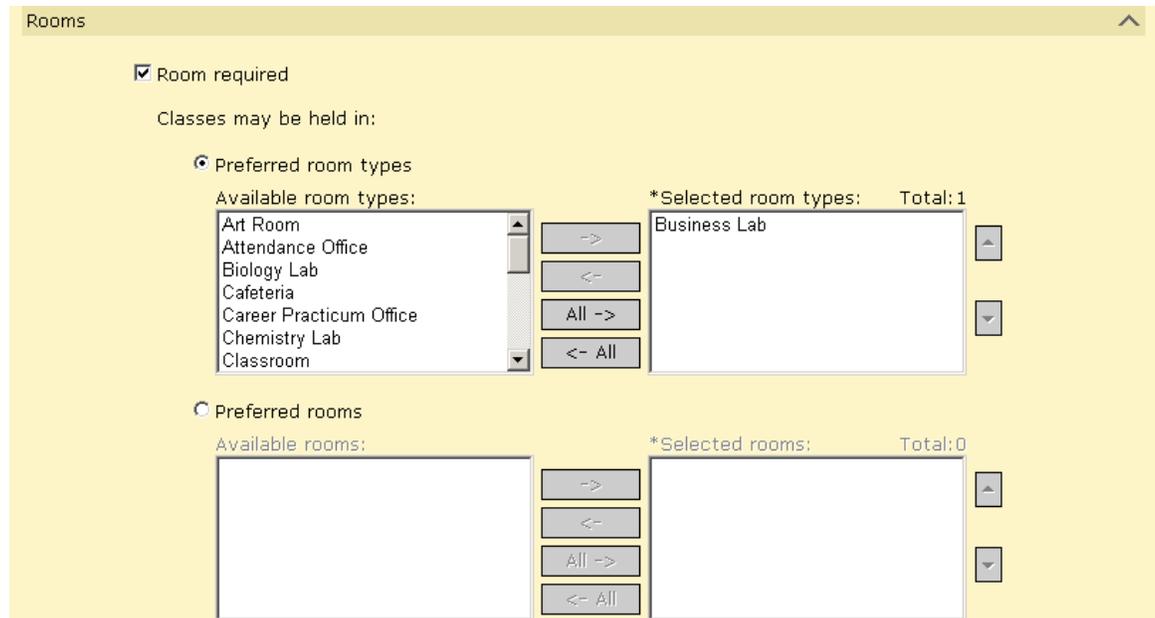
To obtain a complete list of the courses that you already have, click on *Scheduling*, and then click on *Course Setup* in *Step 1*. If you set the *Group by*: option to **None**, you will get an alphabetical list of the courses that are currently assigned to your school. You can click on the printer icon to get a printed list. If

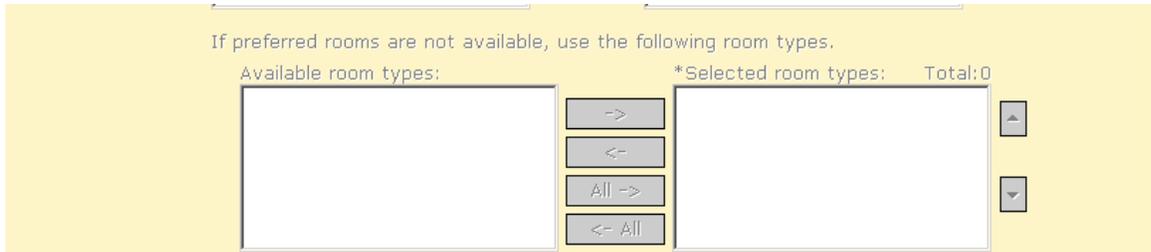
a course is shown on this list, and does **not** show on the *Course Request Tally* list, it means that the *Preferred Room* and/or *potential Meeting Patterns* have not been set in the *Course offerings and Meeting Patterns* section.



If you have added any **new** courses, it will be necessary to set the room requirements. On the *Scheduling* screen, click on *Course Setup* in *Step 1*. Click on a new course. It will be necessary to enter the room information. Click the button labeled *Preferred* room types. Select the room type needed for this course. In most cases it is *Classroom*. You should **not** use a specific room on this screen. Courses are tied to *Room Types*, teachers are tied to specific rooms.

If you do enter a specific *Preferred room*, you will also have to enter a room type in the bottom window of the screen.





D. Additional Planning Schedules

Although an additional planning schedule could be created at this time, it is **very strongly recommended** that you continue working in the default *2006-2007 Planning Schedule*, at least until after all of the course requests have been entered. Instructions for creating additional planning schedules may be found in Appendix C.

III. Set Up the Schedule Structure.

All dates shown in this document are based on the standard DoDEA calendar. If your school does not follow this calendar, the dates must be adjusted to match the calendar used in your school.

A. Scheduling Groups

You will need to establish one *Scheduling Group*. **Do not have more than one group unless absolutely necessary.** Click on *Scheduling Groups* in Step 3 of the *Scheduling* window. Click on *Actions*, and then click on *Add Group*. Enter a *Name* and a *Code*, similar to the example below. The *Description* is optional. When finished, click *OK*.

B. Scheduling Term Sets

Schools that include only grades 9 – 12 should only have two term sets. There will be one for each semester. Middle schools and unit schools that are planning to offer any quarter (9 week) courses will need three term sets. Use the names and dates shown here. The only exception is for schools that do not follow the standard DoDEA calendar. They should change the dates, but use the same names. **Be sure to include the first teacher work day as the start date at the beginning of the year, and include two days after the last**

teacher work day at the end of each term. If this is not done, there may be problems with marks later.

Click on *Scheduling Term Sets* in Step 3 of the *Scheduling* window. Click on *Actions*, and then click on *Add Term Set*. Enter the term set for year-long classes as shown below.

*Term set name:

Terms
Selected: 1 Total: 1

<input checked="" type="checkbox"/> *Term Name	*Code
<input checked="" type="checkbox"/> Year	Yr

Click *Continue*. On the next screen, check the box labeled “*Use this Term Set for this Scheduling Group*”. If you have more than one scheduling group, you will have to repeat this screen for each group. When you select the group and check the box, you will be able to enter the beginning and ending dates for the term. Then click *OK*.

Term set name:

Use this Term Set for this Scheduling Group:

Scheduling Group:

School year: August 23, 2006 to June 17, 2007 Total: 1

Term Name	Code	*Start (mm/dd/yyyy)	*End (mm/dd/yyyy)
Year	Yr	08/23/2006	06/17/2007

Click *Actions* and then click *Add Term Set* to add the semesters. Complete the semester screen as shown below. There will be two semesters. When this screen is complete, click *Continue*.

Term Set

*Term set name:

Terms
Selected: 0 Total: 10

<input type="checkbox"/> *Term Name	*Code
<input type="checkbox"/> Semester 1	S1
<input type="checkbox"/> Semester 2	S2

When you select the *Scheduling Group*, and click the check box, you will be able to enter the dates. Use these dates if you follow the standard DoDEA calendar. After the dates have been entered, click *OK*.

Term Set [Edit term set](#)

Term set name:

Use this Term Set for this Scheduling Group:

Scheduling Group:

School year: August 23, 2006 to June 17, 2007 Total:2

Term Name	Code	*Start (mm/dd/yyyy)	*End (mm/dd/yyyy)
Semester 1	S1	08/23/2006	01/28/2007
Semester 2	S2	01/29/2007	06/17/2007

For schools that do **not** offer any nine-week courses, this completes the *Term Set* setup process.

Middle schools that do offer quarter courses will need to complete the following steps. Click *Actions* and then click *Add Term Set* to add the quarters. Complete the semester screen as shown below. There will be four quarters. When this screen is complete, click *Continue*.

Term Set

*Term set name:

Terms

Selected: 0 Total: 10

<input type="checkbox"/> *Term Name	*Code
<input type="checkbox"/> Quarter 1	Q1
<input type="checkbox"/> Quarter 2	Q2
<input type="checkbox"/> Quarter 3	Q3
<input type="checkbox"/> Quarter 4	Q4

These are the dates for the standard DoDEA calendar. Click *OK* when finished. Schools that follow a different calendar will need to modify the dates.

Term set name:

Use this Term Set for this Scheduling Group:

Scheduling Group:

School year: August 23, 2006 to June 17, 2007 Total:4

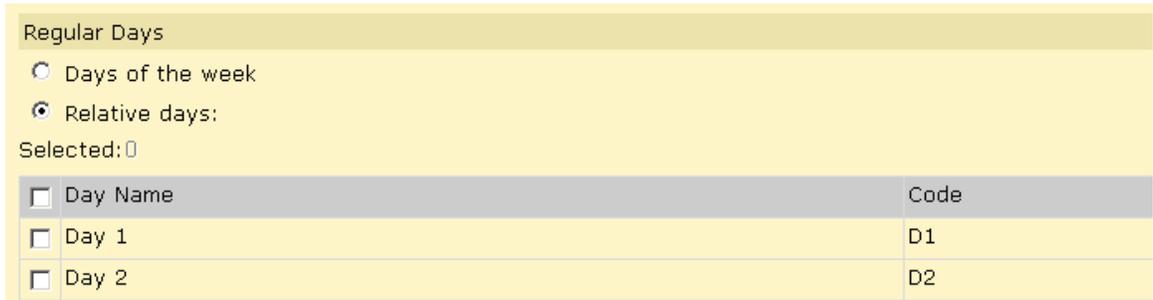
Term Name	Code	*Start (mm/dd/yyyy)	*End (mm/dd/yyyy)
Quarter 1	Q1	08/23/2006	11/05/2006
Quarter 2	Q2	11/06/2006	01/28/2007
Quarter 3	Q3	01/29/2007	04/08/2007
Quarter 4	Q4	04/16/2007	06/17/2007

C. Day Pattern

Keep you day patterns as simple as possible. It is strongly recommended that you use *Relative* days because it gives you more flexibility. If you have a two day pattern and it snows on one day, you can always reassign the days. If you have used *Days of the Week*, the schedule for any given day cannot be changed. The number of days that must be created depends on your school schedule. The most common are:

- Every day the same – one day
- Straight block schedule – two days
- Modified block schedule (block schedule for 4 days, all classes meet on fifth day) – 5 days

A sample two day rotation is shown below. The only required days are Day 1 and Day 2. *Exception* days should not be added at this time. They may be added in the fall, and will be described in the *Attendance* documentation.



Regular Days

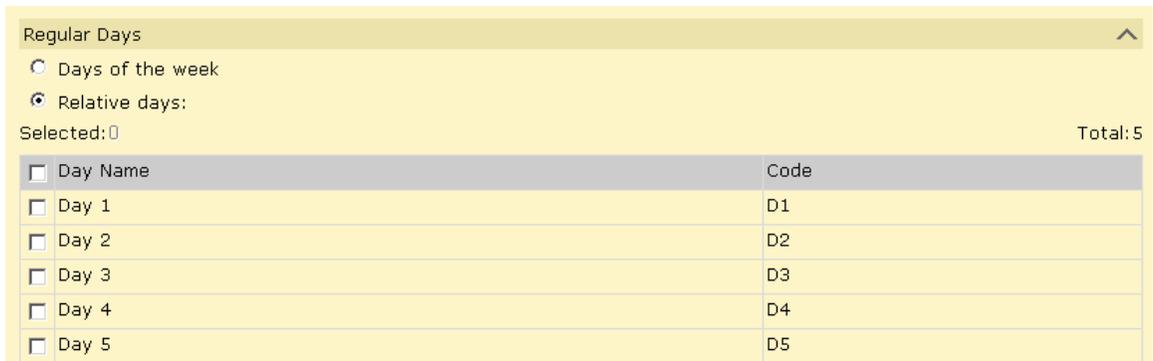
Days of the week

Relative days:

Selected: 0

<input type="checkbox"/> Day Name	Code
<input type="checkbox"/> Day 1	D1
<input type="checkbox"/> Day 2	D2

The **Codes** D1 and D2 are strongly recommended. (Some schools use color *Day Names*, but the important thing is that the codes be **short** – one letter and one number.) The codes should be very short as they will show up later in meeting codes. After all of the days that you need have been added, click *OK*. A sample screen for a 5 day schedule is shown below. Most schools will need only one or two days.



Regular Days

Days of the week

Relative days:

Selected: 0 Total: 5

<input type="checkbox"/> Day Name	Code
<input type="checkbox"/> Day 1	D1
<input type="checkbox"/> Day 2	D2
<input type="checkbox"/> Day 3	D3
<input type="checkbox"/> Day 4	D4
<input type="checkbox"/> Day 5	D5

D. Bell Schedules

Use as few bell schedules as possible. If the period lengths and times are the same every day, you should only have **one** bell schedule. (This is a change from what most schools did last year. It is necessary for schools that are interested in using K-12 Planet in the future.)

Click on *Bell Schedules* in *Step 3* of the *Scheduling* screen. Click on *Actions*. And then click on *Add Period*. Think of the bell schedule as time blocks, rather than periods. If you have a standard block schedule, you may have eight periods (spread over two days), but only four time blocks each day. This plan accommodates the desired single bell schedule. The blocks have been renamed to distinguish them from the period name that was used in the past.

A sample screen for entering a time block (period) in the bell schedule is shown below. All of the check boxes should be checked. We will be calculating daily attendance next year. Indicate the number of minutes between periods for consecutive periods. (This will make attendance reporting easier for classes that last for more than one period). After you complete the entries for each block, be sure to click *OK*.

If you need to make changes in the data that you have entered for a time block, click the *Details* icon at the right end of the line. This will open the window that will allow you to make corrections.

*Start time: 8:00 AM
*End time: 9:30 AM
*Period name: Block 1
*Period label (short code): B1

- Print on schedules
- Use for classes
- Include in daily attendance code calculation rules
- Include in instructional/attendance minutes calculation
- This period is part of regular school hours

Instructional Minutes

For this period only: 90
Passing Time minutes to include for blocked classes: 5

A sample bell schedule for a school that is using the standard two-day block schedule is shown below.

Scheduling Group: All Students

Day: [Prev](#) | [Next](#) [Copy to other days](#) ^

Selected: 0 Total: 4

<input type="checkbox"/> Start Time	End Time	Period Name	Label	Details
<input type="checkbox"/> 8:00 AM	9:30 AM	Block 1	B1	
<input type="checkbox"/> 9:35 AM	11:05 AM	Block 2	B2	
<input type="checkbox"/> 11:10 AM	12:40 PM	Block 3	B3	
<input type="checkbox"/> 1:25 PM	2:55 PM	Block 4	B4	

Notice that this example is for Day 1. When it is complete, click *Copy to other days*. On the next screen, indicate the other day(s) to which this bell schedule should be copied. Click *OK*.

Copy Bell Schedules for Scheduling Group: All Students from Day: Day 1

Available:

Copy to Day(s):

If you have a modified block schedule, where seven classes meet on the fifth day, you should copy this bell schedule to four days. Create a separate bell schedule for the fifth day. If you have one day every week that all classes, except perhaps seminar, meet, you could set up a bell schedule for that day as shown below.

Scheduling Group: High School 7-12

Day: [Prev](#) | [Next](#) [Copy to other days](#) ^

Selected: 0 Total: 7

<input type="checkbox"/> Start Time	End Time	Period Name	Label	Details
<input type="checkbox"/> 8:00 AM	8:50 AM	Block 1	B1	
<input type="checkbox"/> 8:55 AM	9:45 AM	Block 2	B2	
<input type="checkbox"/> 9:50 AM	10:40 AM	Block 3	B3	
<input type="checkbox"/> 10:45 AM	11:35 AM	Block 4	B4	
<input type="checkbox"/> 11:40 AM	12:30 PM	Block 5	B5	
<input type="checkbox"/> 1:10 PM	2:00 PM	Block 6	B6	
<input type="checkbox"/> 2:05 PM	2:55 PM	Block 7	B7	

E. Meeting Patterns

Meeting Patterns define the times that classes can meet. If you have a standard block schedule, please follow the naming convention used here. *Periods 1* through 4 should meet on day 1, and periods 5 through 8 on day 2. This will make it much easier for the SMS team to provide support if your school has problems during the year. It also allows you to sort the student schedule in period order.

There should be one meeting pattern for each class period, and a few double (and possibly triple) meetings patterns to allow for scheduling of two or three hour block classes.

It will be easier to set up the potential meeting patterns for classes if you restrict the meeting patterns to the single periods in the beginning. After potential meeting patterns have been assigned to all of the single period courses, add the multiple meeting patterns, as needed. Add only the combinations needed. More can be added later, if needed.

When you click on *Meeting Patterns* on the Scheduling screen, you will see a graphical representation of the *Bell Schedules* entered in the previous step. If the screen shown here is not correct, return to the *Bell Schedule* window and make corrections. If you named the periods according to the system described in section 4, it is very easy to add *Meeting Patterns*.

To create a meeting pattern, click on *Actions*, and then click on *Add Meeting Pattern*. Enter a *Meeting pattern name* and *Short name* and check the time slots when that class meets. The example below shows the completed screen for a class that meets in Period 1 on a two-day block schedule.

Meeting Pattern for Scheduling Group: High School 7-12

*Meeting pattern name:

*Short name:

Meeting Pattern

	D1	D2
8 AM		
9 AM	B1 <input checked="" type="checkbox"/>	B1 <input type="checkbox"/>
10 AM		
11 AM	B2 <input type="checkbox"/>	B2 <input type="checkbox"/>
12 PM		
1 PM	B3 <input type="checkbox"/>	B3 <input type="checkbox"/>
2 PM	B4 <input type="checkbox"/>	B4 <input type="checkbox"/>
3 PM		

Periods sort in period name order on reports and screens. The alphabetical order should match the sorting sequence that you want to use. Below, is a sample of meeting patterns for a school with a two-day block schedule.

Meeting Patterns for Scheduling Group: High School 7-12			
Selected: 0 Total: 10			
<input type="checkbox"/>	Name	Short Name	Description
<input type="checkbox"/>	Period 1	P1	D1(B1)
<input type="checkbox"/>	Period 2	P2	D1(B2)
<input type="checkbox"/>	Period 3	P3	D1(B3)
<input type="checkbox"/>	Period 4	P4	D1(B4)
<input type="checkbox"/>	Period 5	P5	D2(B1)
<input type="checkbox"/>	Period 6	P6	D2(B2)
<input type="checkbox"/>	Period 7	P7	D2(B3)
<input type="checkbox"/>	Period 8	P8	D2(B4)
<input type="checkbox"/>	Periods 1 & 2	P12	D1(B1), D1(B2)
<input type="checkbox"/>	Periods 1 & 5	P15	D1(B1), D2(B1)

The sample below shows how to add Period 1 for a five day modified block schedule.

Meeting Pattern for Scheduling Group: High School 7-12

*Meeting pattern name:

*Short name:

Meeting Pattern

	D1	D2	D3	D4	D5
8 AM	B1 <input checked="" type="checkbox"/>	B1 <input type="checkbox"/>	B1 <input checked="" type="checkbox"/>	B1 <input type="checkbox"/>	B1 <input checked="" type="checkbox"/>
9 AM					B2 <input type="checkbox"/>
10 AM	B2 <input type="checkbox"/>	B2 <input type="checkbox"/>	B2 <input type="checkbox"/>	B2 <input type="checkbox"/>	B3 <input type="checkbox"/>
11 AM					B4 <input type="checkbox"/>
12 PM	B3 <input type="checkbox"/>	B3 <input type="checkbox"/>	B3 <input type="checkbox"/>	B3 <input type="checkbox"/>	B5 <input type="checkbox"/>
1 PM					B6 <input type="checkbox"/>
2 PM	B4 <input type="checkbox"/>	B4 <input type="checkbox"/>	B4 <input type="checkbox"/>	B4 <input type="checkbox"/>	B7 <input type="checkbox"/>

Repeat this process to add *Meeting Codes* 2 through 8. A sample of the window showing all the meeting codes entered for a high school with five relative days is shown below. You are not restricted to these codes. Others are possible. However, in most cases, Career Practicum classes should be consecutive.

Meeting Patterns for Scheduling Group: High School 7-12		
Selected: 0		Total: 10
<input type="checkbox"/> Name	Short Name	Description
<input type="checkbox"/> Period 1	P1	D1(B1), D3(B1), D5(B1)
<input type="checkbox"/> Period 2	P2	D1(B2), D3(B2), D5(B2)
<input type="checkbox"/> Period 3	P3	D1(B3), D3(B3), D5(B3)
<input type="checkbox"/> Period 4	P4	D1(B4), D3(B4), D5(B4)
<input type="checkbox"/> Period 5	P5	D2(B1), D4(B1), D5(B5)
<input type="checkbox"/> Period 6	P6	D2(B2), D4(B2), D5(B6)
<input type="checkbox"/> Period 7	P7	D2(B3), D4(B3), D5(B7)
<input type="checkbox"/> Period 8	P8	D2(B4), D4(B4)
<input type="checkbox"/> Periods 1 & 2	P12	D1(B1), D1(B2), D3(B1), D3(B2), D5(B1), D5(B2)
<input type="checkbox"/> Periods 1 and 5	P15	D1(B1), D2(B1), D3(B1), D4(B1), D5(B1), D5(B5)

In the description column, it shows the day and period for each meeting pattern. It works best if you have followed the examples in this document for naming days (D followed by a number) and periods (P followed by a number).

IV. Configure Student Loading Rules

There are three types of student loading rules.

Constraints allow you to control the distribution of students in classes. For example, a constraint could be used to balance a class by gender.

Restrictions allow you to restrict **classes** to certain students. For example, you should restrict special education classes to students who are on an IEP. You could restrict one section of Art 7-8 to 7th grade students, and another to 8th grade students.

Constraints and *Restrictions* are described in **Appendix D**.

Team Loading Rules are used only in middle schools that have team teaching. They are described in **Appendix I**.

V. Course Offerings and Meeting Patterns

Before building the master schedule, you must configure terms and meeting patterns for courses. Click on *Scheduling* under the *Admin* menu. **Be sure that you are working in the *Planning Calendar*.**

Click on *Course Offerings and Meeting Patterns* in step 5 of the *Suggested steps for scheduling setup*. Sort the courses as desired by using the *Group by* box in the upper right corner of the screen. If you *Group by: None*, the courses will be in alphabetical order by name.

There are two screens that must be completed for each course that you plan to offer. The easiest way to do this is to do the first screen (*Course Scheduling*) for all courses, and then to do the second screen (*Course Offerings*) for all courses. The data that you entered last year for *Course Scheduling* is automatically copied to the new *Planning Schedule*. Since this refers primarily to rooms for courses, you may not need to make any changes. Just be sure to add this information for any courses that you did not offer last year. In this way you can take advantage of the *copy* feature and save a lot of time.

As a general rule, you should **not** enter *Preferred rooms* for a course. Enter only the *Preferred room type*. The room type is tied to the course. The specific room is tied to the teacher.

Since there is currently no report that indicates which courses have meeting patterns, it is strongly recommended that you print an alphabetical list of all courses before continuing. As the data is entered for each course, put a check mark on the list so that you know that it is completed. One way to determine which courses are lacking this data is to print an alphabetical list of all courses from the *Course Setup* section in *Step 1*. Then print the *Course Request Tally* in *Step 5*. Courses that appear on list of courses, but not on the tally are lacking room information and/or meeting patterns.

If you changed the Scheduling Setup in any way, you will need to re-enter the Course Offerings for each course. This can be done very quickly. Make the following Saved Lists of courses, as needed for your school.

Year-long courses – includes all single-period courses you will offer that are listed as 36 weeks in the list of approved courses from DoDEA.

Semester courses – includes all courses you will offer that are listed as 18 weeks in the list of approved courses from DoDEA or the supplemental middle school course list from DoDDS-E.

Double-period courses – include all courses that meet two periods for two credits

Triple period courses – include all courses that meet three periods for three credits.

Quarter Courses – (middle schools only) includes all middle school courses you will offer that are listed as 9 weeks in the list of approved courses from DoDEA or the supplemental middle school course list from DoDDS-E.

Seminars – restricted to one meeting pattern.

Be very sure that every course is in the correct *Saved List*. Errors here can cause big problems next year. No course should be on more than one list.

To create a *Saved List*, click on *Course Offerings and Meeting Patterns* on the *Scheduling* window. This will give you a list of all courses. You can select *Group by None*, if you want an alphabetic list. Select your year-long courses, then click *Actions*, and *Save to List*. If you are creating a new list, you will be prompted for a name and a description. If the list already exists, you can add to it by clicking *Add to existing list* and selecting the correct list name. It is possible to add courses to a list. You can also add or delete courses from a *Saved List* by clicking *Actions*, then clicking *Edit Saved List*.

After you have created all of the lists that you need, you will set up **one course** in each category, and then copy it to the other courses on the same list.

Year-long (36 week) single period course

For example, click on *Course Offerings and Meeting Patterns* in *Step 5* of the *Scheduling* screen. To get an alphabetical list of courses, *Group by None*. Click on the selected course. Click on the *Default Offering* radio button on the Year line. Move all of the single periods that this course might meet to the *Selected Patterns* box. In this example, period 8 is seminar, so it is not moved to the *Selected patterns* box. Click OK.

Algebra I [Copy](#)

Offerings ^

Scheduling Group	Term Set	Default Offering	Allowed Offering	Meeting Patterns
All Students	Quarter	<input type="radio"/>	<input type="checkbox"/>	0
All Students	Semester	<input type="radio"/>	<input type="checkbox"/>	0
All Students	Year	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	0

Select a default offering to make the course available for scheduling (deselect the default to remove the course from scheduling). This will determine the term set used for classes when they are initially created. Select allowed offerings to allow users to schedule classes manually to different term sets.

Meeting Patterns ^

Selected scheduling group/term set: All Students /Year

Available patterns:

- Period 8
- Periods 1 & 2
- Periods 1 and 5

Selected patterns:

- Period 1
- Period 2
- Period 3
- Period 4
- Period 5
- Period 6
- Period 7

Default offering

In order to allow students to take a single semester of a year-long course, it is also necessary to set *Semester* as an *Allowed Offering*. After clicking on the *Allowed Offering* button on the *Semester* line, you will also need to copy the single period meeting patterns to the *Selected patterns* box. When this has been done the number of meeting patterns on the last two lines should be the same. To see the available meeting patterns, click on the **blank space** after the word *Semester* or *Year*.

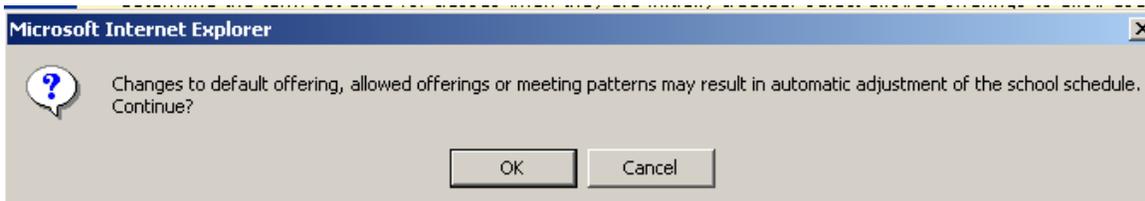
Offerings

Scheduling Group	Term Set	Default Offering	Allowed Offering	Meeting Patterns
All Students	Quarter	<input type="radio"/>	<input type="checkbox"/>	0
All Students	Semester	<input type="radio"/>	<input checked="" type="checkbox"/>	7
All Students	Year	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	7

Select a default offering to make the course available for scheduling (deselect the default to remove the course from scheduling). This will determine the term set used for classes when they are initially created. Select allowed offerings to allow users to schedule classes manually to different term sets.

Numbers should be the same

When the course is set correctly, click *Copy* in the upper right corner of the screen. You will see the message shown below, but can click OK. At this point, you do not have a school schedule.



On the next screen, check the box for *Course offerings and meeting patterns*. Click the **Detail** tab. (The *Basic* tab does not work in this version.) Select the appropriate *Course Saved List*, and click *Add Criteria*. Click *Search*. All of the courses on the saved list should appear in the *Available Courses* window. Move them **all** to the *Selected Courses* window. Then, click *OK*.

Copy fields from: Algebra I

Fields to Copy

Selected: 1 Total: 1

- Course fields
- Course offerings and meeting patterns

Courses to Copy to

Basic Detail

Category: [Generic](#)

[Course saved lists](#) equals [Year Long Courses](#)

Add Criteria

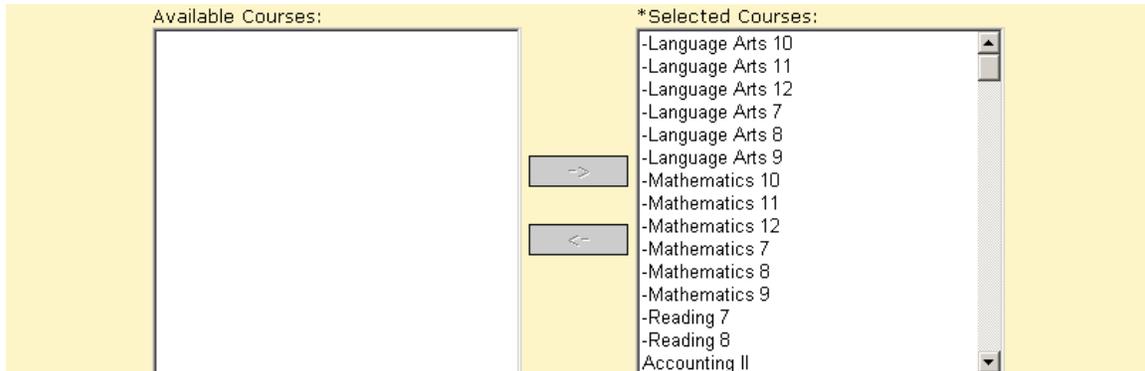
Search Criteria

Match: All Criteria Any Criteria

Course saved lists equals "Year Long Courses"

[Display All Records](#) Remove Search

Move all of the courses from the *Available courses* box to the *Selected Courses* box. Click *OK*.



Semester courses

Select a semester course. The example here is Java I. The window should be set as shown below. **The only offering that should be clicked is the *Default Offering on the Semester line*.**

Java I [Copy](#)

Changes have been saved.

Offerings ^

Scheduling Group	Term Set	Default Offering	Allowed Offering	Meeting Patterns
All Students	Quarter	<input type="radio"/>	<input type="checkbox"/>	0
All Students	Semester	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	7
All Students	Year	<input type="radio"/>	<input type="checkbox"/>	0

Select a default offering to make the course available for scheduling (deselect the default to remove the course from scheduling). This will determine the term set used for classes when they are initially created. Select allowed offerings to allow users to schedule classes manually to different term sets.

Meeting Patterns ^

Selected scheduling group/term set: All Students /Semester

Available patterns:

- Period 8
- Periods 1 & 2
- Periods 1 & 5

->

<-

All ->

<- All

Selected patterns:

- Period 1
- Period 2
- Period 3
- Period 4
- Period 5
- Period 6
- Period 7

After this screen has been saved, it should be copied to the *Saved List for Semester* courses. The procedure is the same as that used for the year-long courses, but both the course being copied and the saved list used are for semester courses only.

Quarter Courses – only used for schools that offer quarter courses

Select a quarter course. The example here is Journalism A. The window should be set as shown below. The **only** offering that should be clicked is the *Default Offering* on the *Quarter* line.

After this screen has been saved, it should be **copied** to the *Saved List* for *Quarter* courses. The procedure is the same as that used for the year-long courses, but both the course being copied and the saved list used are for quarter courses only.

Note to middle schools – Elective course names ending in “A” or “B” are quarter courses. Those ending in “AB” are semester courses.

Offerings

Scheduling Group	Term Set	Default Offering	Allowed Offering	Meeting Patterns
All Students	Quarter	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	7
All Students	Semester	<input type="radio"/>	<input type="checkbox"/>	0
All Students	Year	<input type="radio"/>	<input type="checkbox"/>	0

Select a default offering to make the course available for scheduling (deselect the default to remove the course from scheduling). This will determine the term set used for classes when they are initially created. Select allowed offerings to allow users to schedule classes manually to different term sets.

Meeting Patterns

Selected scheduling group/term set: All Students /Quarter

Available patterns:

- Period 8
- Periods 1 & 2
- Periods 1 & 5

Selected patterns:

- Period 1
- Period 2
- Period 3
- Period 4
- Period 5
- Period 6
- Period 7

Double Period Courses

A procedure similar to that described above is used for courses such as Career Practicum, Culinary Arts, and some ESL courses that meet for two periods. The *Year* option is the **default**, but the *Semester* option is also *Allowed*. The meeting patterns should be the double periods. Periods do not have to be consecutive.

Career Pract - 2hr [Copy](#)

Changes have been saved.

Offerings ^

Scheduling Group	Term Set	Default Offering	Allowed Offering	Meeting Patterns
All Students	Quarter	<input type="radio"/>	<input type="checkbox"/>	0
All Students	Semester	<input type="radio"/>	<input checked="" type="checkbox"/>	2
All Students	Year	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	2

Select a default offering to make the course available for scheduling (deselect the default to remove the course from scheduling). This will determine the term set used for classes when they are initially created. Select allowed offerings to allow users to schedule classes manually to different term sets.

Meeting Patterns ^

Selected scheduling group/term set: All Students /Year

Available patterns:

- Period 1
- Period 2
- Period 3
- Period 4
- Period 5
- Period 6
- Period 7
- Period 8

Selected patterns:

- Periods 1 & 2
- Periods 1 & 5

Triple Period Courses

Some Career Practicum and ESL course may meet for three periods. The setup is very similar to that for the double period courses. The only change is that the *Selected Patterns* would be for three periods.

Seminar

If you have seminar classes, the setup is similar to that for single period classes. However, there would only be **one Selected pattern**.

VI. Student Course Requests

If you have not yet entered student course requests, that must be done at this time. Detailed instructions for this process may be found in **Appendix A**.

VII. Create the Schools Master Schedule

Detailed instructions for this process may be found in **Appendix E**

VIII. Load Student Schedules

Once the Master Schedule has been created, you are ready to *Load Students*.

A. Student Loader Options

Click on *Student Loader Options* in *Step 7* of the *Scheduling* screen.

General options

Class overfill should usually be set to 0.

Set the *unscheduled requests* option to a fairly high number. If it set too low, a student will not receive any schedule. This makes it more difficult to identify specific problems.

Weighted options

Determine which of the options you want to use, and what the priority is. Move the ones that you plan to use to the *Selected options*: window. Sort them in priority order by highlighting an option and using the up and down arrows at the right of the screen to change the order.

The screenshot shows a software window titled "General Options" with a yellow background. It contains several settings:

- Class overfill %:** A text input field containing the number "0".
- If a student has more than:** A text input field containing the number "4", followed by the text "unscheduled requests, do not schedule at all".
- Three checked checkboxes with labels:
 - Attempt to re-schedule students to avoid conflicts caused by full classes
 - Attempt to schedule an equal number of students to each class choice for each course
 - Use alternates

Below the General Options section is the "Weighted Options" section, also with a yellow background. It features two lists:

- Available options:** An empty rectangular box.
- Selected options:** A list of five items, each with a small downward-pointing arrow to its right:
 - Use term preferences
 - Use class attribute rules
 - Use restriction constraints
 - Use class load balancing rules
 - Use capacity balancing constraints
 - Use class sequencing rules

Between the two lists are four buttons: a right-pointing arrow (>), a left-pointing arrow (<), an "All >" button, and a "< All" button.

At the bottom of the Weighted Options section, there is a small instruction: "Change the order of items in the list to change their relative priority (the first item in the list is the highest priority, the last item is the lowest priority)."

B. Load Students

Before running the *Load Students* process, be sure that the *Requested Load* is correct. No student should have a load greater than the number of available periods. If a student has fewer requests than a full load, he will not get a full

schedule. If he has too many requests, electives may be scheduled in place of required courses.

The *Requested Load* for all students should equal the number of periods in the day. This is very important. A student should **never** have a request load that is greater than the available number of periods. If a student has too many requests, he may be scheduled for electives instead of required courses. The extra courses should be listed as *Alternates* rather than *Requests*.

If a student is definitely not returning in the fall, he should not have any requests. If there is any chance that he will return, he should have a full request load. The only exception would be home schooled students who will be taking a very limited number of courses.

You can sort by the *Requested Load* by clicking on the words *Requested Load* as shown below. Once you have done this, there will be a small arrow next to the word Load. Clicking this arrow will reverse the sort order. This technique will make it easy to identify students with too few or too many courses.

Selected: 0		
<input type="checkbox"/> Name	Gr	Requested Load
<input type="checkbox"/> Adams, Jasmine K	7	8.0
<input type="checkbox"/> Adeoti, Gabrielle S	7	8.0
<input type="checkbox"/> Adorjan, Lindsey E	7	8.0
<input type="checkbox"/> Alegado, Kristian D	7	8.0
<input type="checkbox"/> Avalos, Elias C	7	8.0
<input type="checkbox"/> Branham, Albert A	7	8.0
<input type="checkbox"/> Carder, Sarah I	7	8.0
<input type="checkbox"/> Clark, Whitney L	7	8.0
<input type="checkbox"/> Coia, Jake E	7	8.0
<input type="checkbox"/> Corriveau, Rebecca R	7	8.0
<input type="checkbox"/> Crownover, Bailey M	7	8.0

Click here to sort by load.

Once the *Requested Load* is correct for all students, select the students to be scheduled. You can run this process multiple times. You may want to load seniors first, then juniors, etc.

Select the students to be scheduled, then click *Load Students*. The process runs in the background. You will receive an alert message when it is completed.

C. Check Student Scheduled Load

After you have loaded all students, look at the *Load Students* screen again. It will now show the scheduled load for each student. You can sort by the *Scheduled Load* by clicking on the *Scheduled Load* column header. You can also reverse the sort order by clicking on the symbol after the words *Scheduled Load* in the column header. The goal is to have all students fully scheduled.

Selected: 0 1 - 30 of 68 [Prev](#) | [Next](#)

<input type="checkbox"/> Name	Gr	Requested Load ▼	Scheduled Load
<input type="checkbox"/> Adams, Jasmine K	7	8.0	8.0
<input type="checkbox"/> Adeoti, Gabrielle S	7	8.0	7.0
<input type="checkbox"/> Adorjan, Lindsey E	7	8.0	8.0
<input type="checkbox"/> Alegado, Kristian D	7	8.0	7.0
<input type="checkbox"/> Avalos, Elias C	7	8.0	8.0
<input type="checkbox"/> Branham, Albert A	7	8.0	7.0
<input type="checkbox"/> Carder, Sarah I	7	8.0	8.0
<input type="checkbox"/> Clark, Whitney L	7	8.0	7.0
<input type="checkbox"/> Coia, Jake E	7	8.0	8.0
<input type="checkbox"/> Corriveau, Rebecca R	7	8.0	7.0
<input type="checkbox"/> Crownover, Bailey M	7	8.0	8.0

D. Modifying Student Schedules

Once the computer scheduling process is complete, you should look at the individual schedules for students who are not fully scheduled. **Appendix G** contains instructions on the process for changing student schedules.

E. Reports

Appendix H contains information on scheduling reports that may be useful.

Appendix A - Student Course Requests

Use *Student Search* to select students. You may want to select students by *Grade* to facilitate copying requests. If you are using the *Planning* calendar, the “current” grade is the one that the student will be in next year.

To speed up access to the *Schedule* window for students, you can select a group of students before starting. You will then be able to use the *Next* or *Previous* options to move directly from the *Schedule* window of one student to the *Schedule* window of the next student, without having to open the demographic window for each student.

Click on a student, and then click on *Schedule* on the left side of your screen. There are four basic ways to add course requests. These may be used in any combination. The section of the window that deals with course requests is shown below.

Course Requests

Course #: Add

Selected: 0 Total: 0

<input type="checkbox"/>	Status	Course Name	Course #	Term	Priority	Required	Load Factor
There are no records in this list.							

Requested scheduling load: Required: Elective:

Alternate course #: Add

Selected: 0 Total: 0

<input type="checkbox"/>	Status	Course Name	Course #	Term	Priority	Load Factor	Alternate For
There are no records in this list.							

A. Entering course numbers

To enter one or more courses for a single student, you can type the course codes in the window labeled *Course #*. If entering multiple codes, **the codes must be separated by commas**. When the codes have been entered, click *Add* at the end of the row where you have been typing.

This is the easiest way to enter course requests for a single student. Remember to click **Save** before going on to the next student.

If multiple students have the same requests, you could copy selected requests from one student to another. Refer to section C of this appendix.

B. Searching for a course

You can use the *Search* option to obtain a list of courses that meet specific criteria. Click on the √ at the end of the line shown below to open the collapsible panel and see the *Course Search* window.

The screenshot shows a window titled 'New Schedule' with two tabs: 'Course Requests' and 'Class Search'. The 'Class Search' tab is active, and a 'Course Search' dropdown menu is visible at the bottom right of the window.

Enter the Search criteria that you want to use. Then click **Search**. The example shown below would list all of the language arts courses.

The screenshot shows the 'Course Search' window with two tabs: 'Basic' and 'Detail'. The 'Basic' tab is active. The search criteria are: 'Search by: Course number' (dropdown), 'starts with' (dropdown), and 'LA' (text input).

Another option would be to use Course grade level equals 12. This would list all of the courses that are recommended for students in grade 12.

The screenshot shows the 'Course Search Results' window. The search criteria are 'List: Course grade level equals "12"'. A table of results is shown with the following data:

Course Name	Course #	Term	Priority	Required	Load Factor
<input type="checkbox"/> AP Biology+	SCB612	1		AP Biol+	
<input type="checkbox"/> AP German Lang-DL+	FLG6140T	1		AP Ger-DL+	
<input type="checkbox"/> German I	FLG301	1		German 1	
<input checked="" type="checkbox"/> Language Arts 12	LAE601	1		LA 12	
<input type="checkbox"/> AP English Lit	LAL613U	1		AP Eng Li	
<input type="checkbox"/> German II	FLG401	1		German 2	
<input type="checkbox"/> German III	FLG501	1		German 3	

Buttons for 'Add Request' and 'Add Alternate' are located at the bottom of the window.

Check each of the courses that you want to add for this student, and then click *Add Request*. The selected courses will then appear in the Course Requests window.

<input type="checkbox"/>	Status	Course Name	Course #	Term	Priority	Required	Load Factor
<input type="checkbox"/>		Language Arts 12	LAE601		10	Elective	1
<input type="checkbox"/>		US Government	SSG601		10	Elective	0.5

When finished adding courses, click **Save** before going on to the next student.

C. Copy requests

Individual, or multiple, course requests may be copied from a single student to one or more other students. For example, to copy Seminar, US Government, and Language Arts 12 to all 12th grade students, you would select these courses as shown below. (When copying requests, all of the information shown on the line following the course name is copied.) Copying courses from one student to another does **not** delete existing course requests. **It adds to them.** Any duplicate requests will have to be deleted manually, one at a time.

<input type="checkbox"/>	Status	Course Name	Course #	Term	Priority	Required	Load Factor
<input checked="" type="checkbox"/>		Language Arts 12	LAE601		10	Elective	1
<input checked="" type="checkbox"/>		Seminar	AAH301	None	10	Elective	1
<input type="checkbox"/>		German III	FLG501		10	Elective	1
<input type="checkbox"/>		Math Analysis	MAD501		10	Elective	1
<input type="checkbox"/>		Physics	SCP501		10	Elective	1
<input checked="" type="checkbox"/>		US Government	SSG601		10	Elective	0.5
<input type="checkbox"/>		Career Pract - 2hr	VEW302		10	Elective	2
<input type="checkbox"/>		Psychology	SSP501		10	Elective	0.5

Click *Edit* on the menu bar, click *Copy Fields*, and then click *Course Requests*. On the next screen, check the *Student Request fields* box.

Fields to Copy ^

Selected: 1 Total: 1

- Student Request fields
- Course, Required/elective, Priority, Term, Preference/override, Scheduling config

In the bottom section of the screen, click the *Detail* tab. Then scroll down to *Generic*. With word *Generic* showing in the *Category* field, scroll down to *Grade (Active)* in the *Select a field* box. Set the other two boxes as shown below, with the desired grade in the last box. Click *Add Criteria*, and then click *Search*. A list of the students who meet this criterion will appear.

Basic Detail

Category: Generic

Grade (Active) equals 12

Add Criteria

Select the students for whom you want to copy these requests. **Be very careful here. The grade is the grade that the students are enrolled in this year. For the lowest grade, students from two different grades will be on the same list.** Before copying courses, you should print a list of the students in each grade from the *Quick Search* option. Use this list to verify that you are selecting the correct students. (You may want to create saved lists.) By holding down the

Ctrl key while clicking students, you can highlight several students. Move them from the *Available School Students* box to the *Selected School Students* box, and click *OK*. The selected requests will be copied to all of these students.

D. Mass assign

Another option is to use *Mass Assign*. Select the students to whom you want to assign the course(s). Click *Actions*, the *Assign*, then *Course Requests*. Select a course, and click *Add Request*. If you want to add multiple requests, you can select another course, and then click *Add Request*. When all of the courses that you want to add are shown in the *Add Requests* window, click *OK*. This will automatically add these requests for the selected students.

A new feature in this section lets you substitute one course for another for a group of students. This can be very helpful if you decide the change the courses that will be offered in an exploratory wheel, but it can be used to substitute any requests or alternates. In the example below, Music A would be substituted for Art 7-8 A for all of the selected students. To do this, select the students that you want to move. An easy way to do this is to use the *Course Request Tally* to get a list of the students. Select the students, click on *Actions*, and then click on *Assign*. Click on *Course Requests*. Use the *Course Search* to identify the course that you want to drop. Check the selected course, and then click *Remove Request*. Use the *Course Search* to find the course that you want to add. Check the selected course, and then click *Add Request*. You may set a priority and whether the added course is elective or required. (These fields are optional.) Check the *Replace only* field at the bottom of the screen and click *OK*.

Course Requests to add/remove for selected students

Add Requests:

Art 7-8 A (Art 7-8 A - ARA101)

Priority: Course is:

Remove Requests:

Music A (Music A - MUG101)

Priority: Course is:

Replace only (requires 1 course to add and 1 to remove)

E. Specific course information

You can change the *Term*, *Priority*, and *Required* fields for any course for individual students. The *Term* option only works if you have completed the *Course Offerings* and *Meeting Patterns* information correctly for the course. By default, this column is blank. It automatically uses the default course setting for a year long or semester class. It is only used if a student is requesting half of a year long course, or wants to take a semester course in a specific semester. In this case, when you click on the blank field you may select S2(P), S2(O), S1(P), S1(O), Yr(P), or Yr(O). For example, a student who was only going to take second semester German would select S2(O). The O stands for only, and the P stands for preferred. **Use the (O) to assign a student to half of a year-long course. Use the (P) option to indicate a preference for a specific semester of a semester-long course.** If you do not see the option that you need when clicking a course in this column, it probably means that you did not set up the appropriate *Meeting Patterns* for the course. For example, you cannot schedule a semester of a year-long course if you did not enter *Semester* as an *Allowed Offering* in *Course Offerings* for that course.

Priority is used to determine the order of scheduling courses within the required or elective group of courses. All required courses will be scheduled before elective courses. Within these two groups, the course with the lower *Priority* number will be scheduled first. The default value is 10. Numbers may range from 1 (highest priority) to 9999 (lowest). A blank field is the same as 9999. The *Required* field may be changed between *Required* and *Elective*. This is used for scheduling purposes only. Required courses take priority over electives.

F. Entering alternate requests

An alternate request is a course that a student would take if his original request could not be scheduled. To add an alternate course, you may either enter the course number or select from a search list. If adding from a search list, click *Add Alternate* instead of *Add Request*. If entering a course number, use the *Alternate Course #* box instead of the *Course #* box. The default *Alternative for* entry is *Any Elective*, but you can click on this entry and change it to any course that the student has already selected.

Alternate course #:

Selected: 0 📄 Total: 1

<input type="checkbox"/>	Status	Course Name	Course #	Term	Priority	Load Factor	Alternate For
<input type="checkbox"/>		Sociology	SSS401		10	0.5	Psychology

G. Verifying totals

When all of the requests for a student have been entered, check the total at the bottom of the list of requested courses. The *Load Factor* does not change when a student takes only one semester of a year-long course. However, the *Requested Scheduling Load* is calculated correctly. The sum of the *Required* and *Elective* courses should equal the number of periods in your schedule.

<input type="checkbox"/>	Status	Course Name	Course #	Term	Priority	Required	Load Factor
<input type="checkbox"/>		Language Arts 12	LAE601		10	Required	1
<input type="checkbox"/>		Seminar	AAH301		10	Required	1
<input type="checkbox"/>		German III	FLG501		10	Elective	1
<input type="checkbox"/>		Math Analysis	MAD501		10	Required	1
<input type="checkbox"/>		Physics	SCP501		10	Required	1
<input type="checkbox"/>		US Government	SSG601		10	Required	0.5
<input type="checkbox"/>		Career Pract - 2hr	VEW302		10	Elective	2
<input type="checkbox"/>		Psychology	SSP501		10	Elective	0.5

Requested scheduling load: Required: 4.50 Elective: 3.50

H. Identifying Students Who Have Too Few or Too Many Requests

To identify students who have too few requests, use *Detailed Search*. In the example below, students were selected by *Grade*, but this is not required. When you have selected a grade (if desired), then click *Add Criteria*.

Category:

is

Then select students by scheduling load as shown below. In this case, the school has 8 periods, so the request is to identify students who have a *Requested Scheduling Load* of *less than* 8.

Category:

less than

This will produce a list of students who do not have enough course requests. You can select all students in the list. Then, open the first student, and go to the *Schedule*

page. After adjusting the courses for that student, click on *Next* at the top of the page. This will take you directly to the *Schedule* page for the next student on the list.

You can use a similar technique to find any students who have too many requests. Just change the middle field on the request screen shown above to *greater than*.

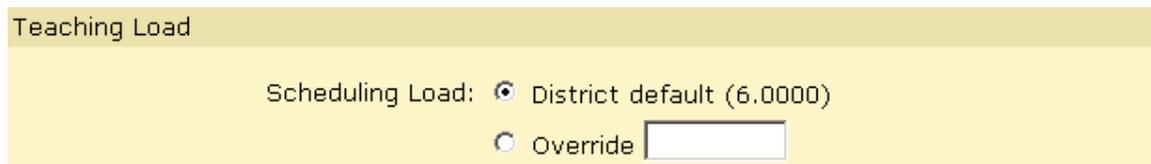
This page intentionally left blank.

Appendix B - Staff Setup

Click on *Scheduling* in the *Admin* section of the menu at the left of the screen. Then click on *Staff Setup* in *Step 1* of the Scheduling screen. If you click on All Staff, you will get a list of all of the staff members assigned to the school. Select the ones who will be assigned to teach classes.

A. Teaching Load Panel

Click on the first selected teacher. If you open the *Teaching Load* panel, you will see something similar to the example below.

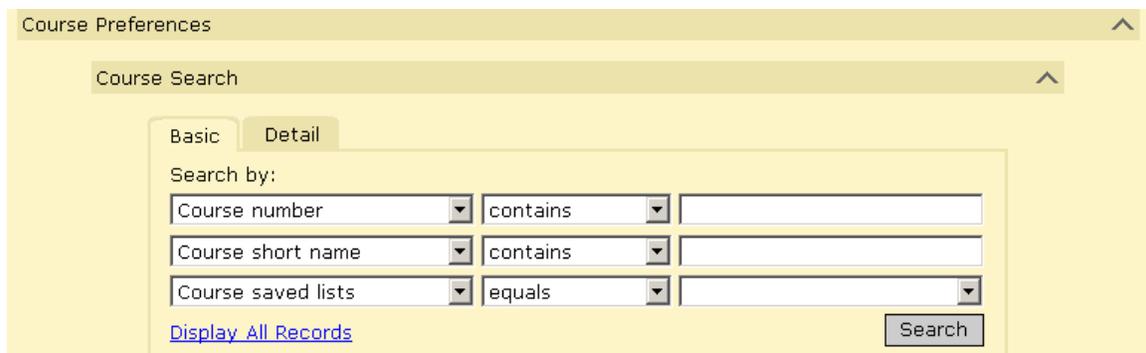


The screenshot shows a yellow panel titled "Teaching Load". Below the title, it displays "Scheduling Load:" followed by two radio button options. The first option is "District default (6.0000)" and is selected. The second option is "Override" followed by an empty text input field.

If a teacher will have more than 6 classes in a term, this number may be increased. Courses that are combined are treated as a single class. For example, a teacher could have 3 semester long distance ed classes at one time, and this would count as one class. However, he might also have 4 year long distance ed classes during the same period. They would have to be in a different combination, and would count as a second class. If he had this situation only during one period, and had a regular schedule in other periods, you would need to increase the override to 7. **It is not necessary to combine classes., and may be better not to do so.** The *Override* value applies only to the teacher whose screen is open at the time you set it.

B. Course Preferences

This feature is very similar to the way that you enter course requests for students. You may either use the *Course Search* option, or enter the *Course Numbers* (codes).



The screenshot shows a yellow panel titled "Course Preferences". Below the title is a "Course Search" section with a search bar and a dropdown arrow. Underneath are two tabs: "Basic" and "Detail". The "Basic" tab is active. Below the tabs is a "Search by:" section with three rows of search criteria. Each row has a dropdown menu for the search field, a dropdown menu for the search operator, and a text input field. The first row is "Course number" with "contains" operator. The second row is "Course short name" with "contains" operator. The third row is "Course saved lists" with "equals" operator. Below the search fields is a blue link "Display All Records" and a "Search" button.

Course number:

E.g. 10001,10093,20372

No matter which method you use, be sure to click *Add* after selecting the courses. Once the courses have been added, you can see them by opening the *Preferred Courses* panel as shown below.

<input type="checkbox"/> Preferred Course	*Preference
<input type="checkbox"/> BCA301 - Personal Finances	5
<input type="checkbox"/> BCB303 - WordProcess Sfwr App	5
<input type="checkbox"/> BCB304 - PresentationSfwr App	5
<input type="checkbox"/> BCB306 - Spreadsheet Sfwr App	5
<input type="checkbox"/> BCC305 - Java I	5

The default priority for a course is 5. If several teachers could teach a course, you can indicate that a teacher is preferred for this course by changing the priority to a lower number. Master Builder will not schedule a teacher for a class with a priority of 9. However, this could be scheduled manually later.

If a teacher should have a seminar class, be sure to include this, and give it a high priority (3 or 4, if other classes are 5).

If you want the computer to automatically assign a teacher a prep period each day of a block schedule, use *Reservation Labels*. These are described in **Appendix F**. If you have created *Reservation Labels* for *Prep-Day 1* and *Prep-Day 2*, each teacher should be assigned a preference for each of these labels, with a **priority of 1**. This will insure that they have a prep period each day. The computer will still consider student requests in assigning the specific period.

To add a *Reservation Label* as a *Preference*, open the *Course Preferences* panel. Click on **Detail** in the *Course Search* section. Set the screen as shown below, and click on *Add Criteria*. Click on *Search*.

Basic **Detail**

Category:

When you see the list of available labels, select the one(s) that you want to use, and then click *Add*. Be sure to change the value in the *Preference* column to 1.

Search results:

- ES - Elem School
- PD1 - Prep-Day 1
- PD2 - Prep-Day 2

Add

Course number:

C. Room Preferences

At least one room preference should be assigned to each teacher. Most classroom teachers will have only one room. However, if a teacher teaches one class in a regular classroom, and another in the art room or the gymnasium, he would need multiple preferences. Room types are tied to courses, but specific rooms are tied to teachers.

Room Preferences

Available Rooms		Selected Rooms
1 - 5	→ ← All → ← All	1 - 11
1 - 6		2 - 33
1 - 7		
1 - 99		
2 - 56		
2 - 99		

D. Time Restrictions

This feature is used for part-time teachers. The default value is *Teacher is available at all times*. Most schools are using relative day cycles. This feature only works if the teacher is available at the same times every day. For most of our secondary schools, teachers may be available on alternate days. In that situation, this feature does not work. The teacher schedule would have to be adjusted manually.

You can create and use *Reservation Labels* to indicate that a part-time teacher will not be available during specific periods.

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Appendix C – Creating a New Planning Schedule

Although you can create multiple *Planning Schedules*, try to keep the number to a minimum. If you know that you will not use a previously created planning schedule, and will not be copying data from it, it should be deleted. Multiple planning schedules are allowed only in the *Planning Calendar*. During the summer, the *Year End* process will be run. After that time, there will be only one *Schedule*, and it will be in the *Active* calendar. The *Planning Calendar* will no longer be available.

Only the principal and the district ET have the rights to create, delete, and change planning schedules. If the planning schedule is changed for one user at a school, it is changed for all. It is very important to notify all users when you will change a planning schedule. If someone is working in another schedule when you make the change, his work will be lost.

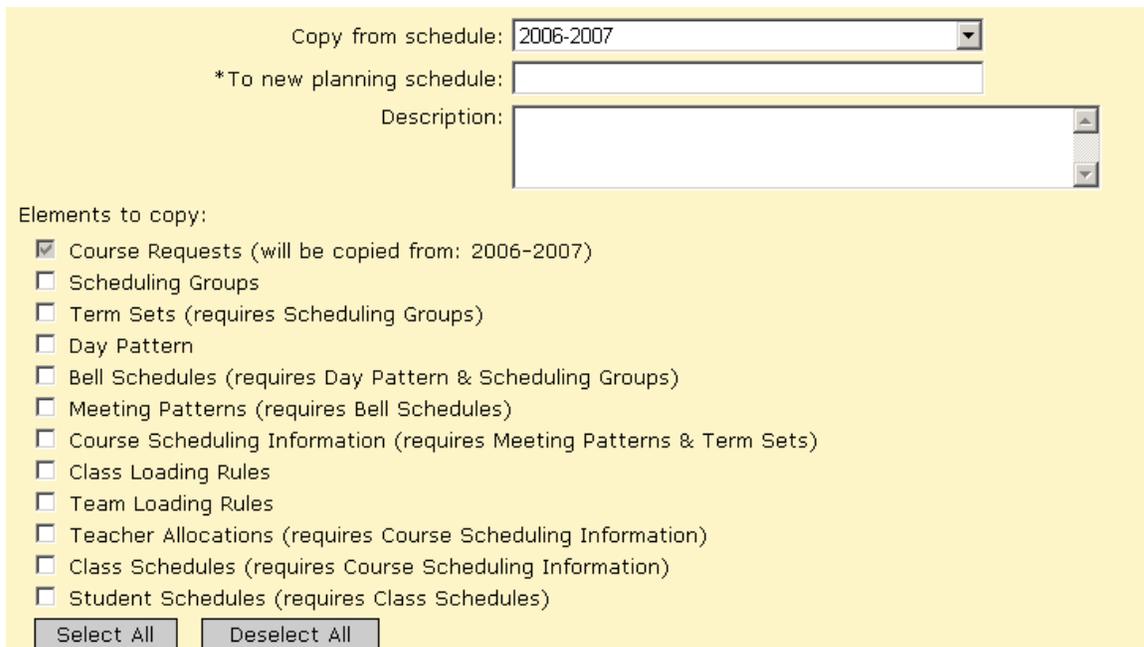
Users should always look at the selected *Planning Schedule* and the year when they start working in the *Scheduling* module.

New *Planning Schedules* are created in the main *Scheduling* window. The currently selected *Planning Schedule* is shown on the screen. To create a new schedule click on the word *New* at the end of the line.



Planning Schedule: 2006-2007 | [Prev](#) | [Next](#) | [New](#) ^

When the screen below appears, name and describe the new *Planning Schedule*. Select the schedule that you want to copy from



Copy from schedule: 2006-2007

*To new planning schedule: [text input]

Description: [text area]

Elements to copy:

- Course Requests (will be copied from: 2006-2007)
- Scheduling Groups
- Term Sets (requires Scheduling Groups)
- Day Pattern
- Bell Schedules (requires Day Pattern & Scheduling Groups)
- Meeting Patterns (requires Bell Schedules)
- Course Scheduling Information (requires Meeting Patterns & Term Sets)
- Class Loading Rules
- Team Loading Rules
- Teacher Allocations (requires Course Scheduling Information)
- Class Schedules (requires Course Scheduling Information)
- Student Schedules (requires Class Schedules)

[Select All](#) [Deselect All](#)

Select the items that you want to copy. Notice that certain items are dependent on others. For example, you cannot copy *Term Sets* unless the *Scheduling Groups* are copied. You cannot copy *Course Scheduling* information unless you also copy *Meeting Patterns* and *Term Sets*.

You will have the option of copying last year's schedule. This is **not** recommended if you want to make any changes in the *Day Pattern* or *Bell Schedule*, as recommended in this documentation.

At the end of the school year, the principal should be sure that the Planning Schedule is set to the one that is to be the final one for next year. Be sure that this is the *Planning Schedule* showing in *Step 2* on the *Scheduling* page. **When the correct one is showing in *Step 2*, go to *Step 8*, and click the *Select Current* button.**

If you make a mistake, you can go back to *Step 2*, and change to the correct *Planning Schedule*. Then, go to *Step 8* and click the *Change selection to current* button. The schedule that is set to become active when YEP (Year End Process) is run, is the only one that will be available in the fall. You will be able to make changes to this schedule, but you will have only the one version to work with.

Appendix D – Student Loading Rules

I. Constraints

This is a new feature that allows you to restrict enrollment in specified **classes**. The example, shown below, would allow you to restrict one section of a course to students in a specific grade level. This can be helpful for middle school electives where you want to keep students from one grade in one section, and students from another grade in another section.

A. Grade Level Example

1. Create the Constraint

Some middle schools want to schedule 7th and 8th grade students in different sections of Art. For example, they might want to have only 7th grade students in section 1, and only 8th grade students in section 2. This would require two constraints – one for Grade 7, and another for Grade 8. The example here shows how to set a constraint for grade 8. On the Scheduling page, click on *Constraints* in *Step 4*. Fill in the screen as shown in the example below.

Define Constraint

*Name:

Defined at:

Program Constraint
 Track program attendance for classes with this constraint

Constraint type: Restriction
 Capacity Balancing

Complete the following phrase to define the constraint.

Class % students the specified criteria.
 #

Select Student Criteria

Define criteria that students must meet to be affected by this constraint.

Category:

Search By:

Eligibility Criteria

- Criteria
Code Equals 8

After clicking *Add Criteria*, click the button labeled *Validate*. This will check whether the *Constraint* is valid. If it is valid, proceed to the next window to indicate which courses would be allowed to use this constraint. This example restricts it to art classes, but you could add as many as you want. In most cases, the *Restriction* should be *Available* (**not Mandatory** or *Default*).

2. Assign the Constraint to Classes

The next step is to assign the constraint to specific classes. Click on one class – Art 7-8 AB-1 is shown below. Move the constraint *Grade 7(S)* to the *Selected constraints:* box. Save this. Open Art 7-8 AB-2, and move the constraint *Gr8th grade students to section 2ade 8(S)* to the *Selected constraints:* box.

This would result in all 7th grade students being assigned to section 1, and all 8th grade students to section 2.

3. Apply Constraints

When setting the Student Loader options, be sure to include *Use constriction restraints*.

B. Capacity Balancing Example - Gender

This example could be used to attempt to balance classes by gender when using automatic scheduling. To create this *Constraint*, go to the *Scheduling* page. In *Step 3*, click on *Constraints*. Complete the screen as shown below.

Define Constraint

*Name:

Defined at:

Program Constraint

Track program attendance for classes with this constraint

Constraint type: Restriction Capacity Balancing

Complete the following phrase to define the constraint.

Try to balance the number of students across all classes for the selected courses.

Select Student Criteria

Select field that will be used for balancing across classes.

Category:

BalanceBy:

Select the courses to which this constraint should be applied. You could select all courses, if you want to. It is necessary to click the *Detail* tab to search for courses. Move the desired courses to the *Selected Courses* box.

You then should select one of the following three options:

Available – the constraint is available for all sections of this course. It is not applied automatically, but must be added individually to each course in the Master Schedule window.

Default – the constraint is applied by default to newly created sections of the course. It may be removed for specific classes.

Mandatory - the constraint is automatically applied to new sections of the course. It cannot be removed for specific classes.

II. Class Loading Rules

Class loading rules may be used to schedule students in courses in the same, or different semesters. They may also be used to schedule students into an exploratory wheel. Examples of three uses are shown here.

A. Schedule Two Courses in Different Semesters

Schools frequently want to schedule ninth grade students to take PE-Personal Fitness in one semester, and PE-Lifetime Sports in the other semester. An easy way to do this is to use a Same/different attributes rule. Click on *Class Loading Rules* in Step 4 of the *Scheduling* page. Click on *Actions*, and then click on *Add Rule*.

Rule type: Course sequencing rule
 Same/different attributes rule
 Course load balancing rule

Complete the following two phrases and select courses to define the rule.

1. PE-Lifetime Sports (PEL301), PE-Personal Fitness (PEF301) [Select courses](#)

2.

Always schedule PE-Lifetime Sports (PEL301), PE-Personal Fitness (PEF301) with all different term(s).

B. Schedule Students to Stay in Related Classes

This technique could be used if you wanted students to have the two ninth grade PE classes in the same period, but different semesters. It would require building your master schedule in such a way that section 1 of the first class was in one semester, and section 1 of the other class was in the other semester, but the same period. This technique is frequently used by middle schools for the exploratory wheel classes (see Appendix I). The setup screen for this option would be like that shown below. The key is the section number. The schedule must be configured in such a way that the desired classes have the same section number.

Rule type: Course sequencing rule
 Same/different attributes rule
 Course load balancing rule

Complete the following two phrases and select courses to define the rule.

1. PE-Lifetime Sports (PEL301), PE-
Personal Fitness (PEF301) [Select courses](#)

2.

Always schedule PE-Lifetime Sports (PEL301), PE-Personal Fitness (PEF301) with exactly the same class number.

C. Class Sequence Control

For some semester courses the sequence is important. These rules are only applied if the student is requesting both courses in the sequence during the same year. The example shown below would ensure that students who are requesting both Java I and Java II would be scheduled in the appropriate semesters.

Rule type: Course sequencing rule
 Same/different attributes rule
 Course load balancing rule

Complete the following three phrases with two courses to define the rule.

1. Java I (BCC305) [Select course](#)

2.
 Java II (BCC306) [Select course](#)

3.

Always schedule Java I (BCC305) to begin in a term anytime before Java II (BCC306) begins.

D. Course Load Balancing Rule

This type of rule may be used to distribute courses in the same department into different terms. For example, if most seniors take Government and Contemporary Issues, you could create a rule like the following.

Rule type: Course sequencing rule
 Same/different attributes rule
 Course load balancing rule

Complete the following two phrases and select courses to define the rule.

1. Contemporary Issues (SSZ501),
US Government (SSG601) [Select courses](#)
 All courses

2. To ensure that the difference in scheduling load between terms
does not exceed:

Try to schedule Contemporary Issues (SSZ501), US Government (SSG601) to ensure that the difference in scheduling load between terms does not exceed 0.5.

This rule would try to put the courses in different semesters.

In all of these rules, you have four options:

- Always schedule
- Never schedule
- Try to schedule
- Try not to schedule

It is probably best to use the “try” or “try not to” options in most cases. The exception would be the exploratory wheel described in Appendix I.

Appendix E – Create Master Schedule

The Master Schedule may be created automatically, manually, or by a combination of the two methods.

A. Class Scheduling Options

If you want the computer to partially or fully create the Master Schedule, you must complete the Class Scheduling Options screen shown in Step 6 on the Scheduling screen. You may use any or all of the four options listed. To change the priority order of the options, highlight the option that you want to move, and use the up or down arrows at the right of the screen to change the priority order. The order shown below is recommended.

Class Naming Pattern

Name based on:

Number increment:

Style:

Teacher Allocations

Teacher over-allocation %:

Weighted Options for the Schedule Classes Process

Available options	Selected options
	Minimize potential student conflicts
	Use teacher course allocations
	Use course room preferences
	Use teacher room preferences

Change the order of items in the list to change their relative priority (the first item in the list is the highest priority, the last item is the lowest priority).

B. Course Request Tally

The *Course Request Tally* should be used, whether you are creating the schedule manually or automatically. Once all of the requests have been entered, this report should be used to determine the number of sections of courses that are needed.

You can select the columns to be included on this screen. Click on *Edit* on the menu bar, and then click on *Choose Columns*. The columns that you want included should be moved to the box on the right.

It is possible to print this report by clicking the printer icon in the upper right corner of the screen.

Selected: 0 Total: 15

<input type="checkbox"/>	Course Name	Course #	Prim Reqs	Alt Reqs	Unsched Primary	Alts Used	Opt Size	Avg Size	Classes Needed	Classes Created	Max Size	Lock
<input type="checkbox"/>	Art 7-8 A	ARA101	34	0	34	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Beginning Band M	MUI101	34	0	34	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	German I M	FLG101	0	0	0	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Integrated Sci II	SCG102	68	0	68	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Integrated Sci III	SCG202	0	0	0	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Journalism A	LAJE01E	0	0	0	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Language Arts 7	LAE101	68	0	68	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Mathematics 7	MAM101	68	0	68	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Outdoor Education AB	PED103E	68	0	68	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Pathways to Careers	VEZ101	34	0	34	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Reading 7 AB	RED103	68	0	68	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Seminar M	AAH101	68	0	68	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Speech A	LASE01E	34	0	34	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Study Skills	AAS101	34	0	34	0	25	0	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	World Geography 7	SSC101	68	0	68	0	25	0	0	0	35	<input type="checkbox"/>

To calculate the number of sections needed, select the courses that you want to include. Click on *Actions*, and then click on *Calculate Classes Needed*. You can change the *Classes Needed*, the *Optimum Size*, and/or the *Maximum Size* on this screen. See Appendix J.

To actually create the classes, select the desired courses. Click on *Actions*, and then click on *Create Classes*. If you have changed the number of classes needed, it will actually create the number of classes that you said you needed. This feature allows you to control the number of sections created for each course. If you have made changes, you may want to *Lock* them.

Since student schedules have not yet been run, the *Unsched Primary* column will equal the total number of requests. Once students have been scheduled, you can look at this screen again to see how many students did not get a requested course.

This screen may also be used to create a conflict matrix. Select the courses that you want to include in the matrix. In some cases, the number of conflicts seems to be double. By clicking on the number on the conflict matrix, you can obtain a list of students who would have this conflict. This list appears to be correct.

C. Teacher Allocations

This section works best if you have set up *Teacher Preferences*. If this has been done, you can click on *Teacher Allocations* in Step 6 of the *Scheduling* window. Click on *Actions*, and then click on *Allocate Teachers*. This will automatically allocate teachers to classes, based on the sections created in the *Course Request Tally* section described above.

You can then modify allocations if you want to do so. This may be done whether the list is sorted by teacher or by course. Columns may be selected for display by clicking *Edit* and then clicking *Choose Columns*. The example below is sorted by course. You can see that all sections of Math 7 are taught by the same teacher. The three sections of Seminar M are taught by three different teachers.

Be sure to allocate Seminar classes. If you are using *Reservation Labels* to automatically create prep periods, they must also be allocated here. See Appendix F for instructions on easily creating multiple sections of prep periods.

To change an allocation, click on the check box at the left of the line that you want to change. Change the number of sections in the *Yr*, *S1*, or *S2* column, as appropriate, and click *Save*. It is also possible to change a Preference for a course here. That probably only needs to be done if you plan to run the *Allocate Teachers* process again. After any needed changes have been made, you may want to *Lock* some or all of the allocations.

<input type="checkbox"/> Teacher	Pref	Sched Load Factor	Total # of classes (Cr/All)	Yr #Cls	S1 #Cls	S2 #Cls	Lock <input type="checkbox"/>
Integrated Sci III (SCG202)		1.0					
<input type="checkbox"/> Dawson, Laura	5			0	0	0	<input type="checkbox"/>
Language Arts 7 (LAE101)		1.0	4	4/4			
<input type="checkbox"/> Perron, Patricia	5			4	0	0	<input type="checkbox"/>
Mathematics 7 (MAM101)		1.0	3	3/3			
<input type="checkbox"/> Marr, Ted	5			3	0	0	<input type="checkbox"/>
Physical Ed 7 (PEG104)		1.0					
<input type="checkbox"/> Jimerson, Michael	5						<input type="checkbox"/>
Reading 7 AB (RED103)		0.5	3		2/2	1/1	
<input type="checkbox"/> Perron, Patricia	5				2	1	<input type="checkbox"/>
Seminar M (AAH101)		1.0	3	3/3			
<input checked="" type="checkbox"/> Dye, Jeff	5			0	0	0	<input type="checkbox"/>
<input type="checkbox"/> Feletar, Gary	5			1	0	0	<input type="checkbox"/>
<input type="checkbox"/> Keilty, Patrick	5			0	0	0	<input type="checkbox"/>
<input type="checkbox"/> Marr, Ted	5			0	0	0	<input type="checkbox"/>
<input type="checkbox"/> Perron, Patricia	5			0	0	0	<input type="checkbox"/>
<input type="checkbox"/> Sykes, Linda	5			1	0	0	<input type="checkbox"/>
<input type="checkbox"/> Teall, Daniel	5			1	0	0	<input type="checkbox"/>
<input type="checkbox"/> Vitale-Pieren, Sandra	5			0	0	0	<input type="checkbox"/>
World Geography 7 (SSC101)		1.0	3	3/3			
<input type="checkbox"/> Sykes, Linda	5			3	0	0	<input type="checkbox"/>

D. Master Schedule

If you want the computer to create the *Master Schedule*, click on *Master Schedule* in *Step 6* of the *Scheduling* window. Select the courses to be scheduled. Click *Actions*, and then click *Schedule Classes*. The process will run in the background. You will receive an alert when it is completed.

You can display all or selected classes. There is an option to select different columns for display by clicking on *Edit* on the menu bar.

Selected: 0 17 - 24 of 35 [Prev](#) | [Next](#)

<input type="checkbox"/>	Status	Class Name	Term	Meeting Pattern	Teacher	Room	# Students	Lock
Mathematics 7 (MAM101) Add Class								
<input type="checkbox"/>		Mathematics 7-3	Yr	P1	Marr, Ted	106	0 (0)/30	<input type="checkbox"/>
Outdoor Education AB (PED103E) Add Class								
<input type="checkbox"/>		Outdoor Education AB-1	S1	P5		101	0 (0)/30	<input type="checkbox"/>
<input type="checkbox"/>		Outdoor Education AB-2	S2	P2		101	0 (0)/30	<input type="checkbox"/>
<input type="checkbox"/>		Outdoor Education AB-3	S1	P6		101	0 (0)/30	<input type="checkbox"/>
Pathways to Careers (VEZ101) Add Class								
<input type="checkbox"/>		Pathways to Careers-1	Q1	P1		101	0 (0)/30	<input type="checkbox"/>
<input type="checkbox"/>		Pathways to Careers-2	Q2	P1		101	0 (0)/30	<input type="checkbox"/>
Reading 7 AB (RED103) Add Class								
<input type="checkbox"/>		Reading 7 AB-1	S1	P1	Perron, Patricia	107	0 (0)/30	<input type="checkbox"/>
<input type="checkbox"/>		Reading 7 AB-2	S2	P1	Perron, Patricia	107	0 (0)/30	<input type="checkbox"/>

To add a section for a course, find the course, and click *Add Class* to the right of the course name. To enter a *Term*, *Meeting Pattern*, *Teacher*, or *Room* for a course, click on the check box in front of the desired section. This will open the *Class Information* window at the bottom of the screen. Scroll down to this section.

Enter the *Class Schedule* section, as shown below. **Only use the default term. If the option of Yr is shown, you must select Yr, even though S1 and/or S2 are also shown as options. If the only option is S1 or S2, select one of these.** It is recommended that odd numbered semester courses be assigned to semester 1, and even numbered sections to semester 2. **If the only option is quarters, select the appropriate quarter for the section.**

Enter the teacher and the room number. If *Teacher Preferences* have been set correctly, the room and teacher should be at, or near, the top of the drop down lists.

Class Schedule

Term:	Yr	No conflicts found
Meeting pattern:	P3	
Teacher:	Marr, Ted	
Other teacher:	N/A	
Other teacher:	N/A	
Room:	106	

*At this time the # Students column will be blank if you have not yet scheduled students. That will change after you *Load Students*. You can print the *Master Schedule* in this format by clicking the printer icon in the upper left corner of the screen.*

After you *Load Students*, you can print the *Master Schedule* again, including # Students. This will allow you to see classes that are overloaded or too small. You can move classes, and then *Load Students* again to balance classes.

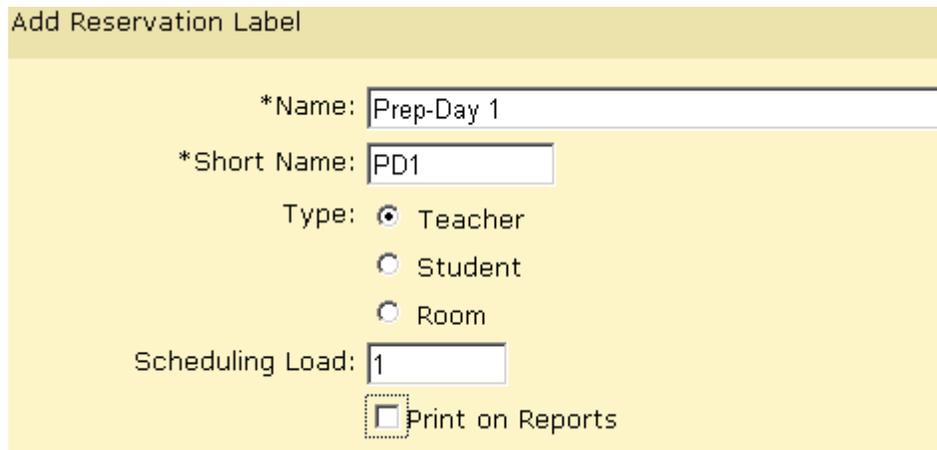
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Appendix F – Reservation Labels

Reservation Labels may be used to reserve periods for teachers, students, and/or rooms. We will use them primarily for teachers.

A. Creating Reservation Labels

To create a *Reservation Label*, go to the *Scheduling* page. Click on *Course Setup* in *Step 1*. Click on *Actions*, and then click on *Add Reservation Label*. The sample below is a typical setup for a Prep Period for Day 1 of a two-day block schedule. *Print on Reports* is not checked because the default is to print it. By unchecking the box, reports can be modified to exclude it. A second *Reservation Label* would then be created for Prep-Day 2. After this is done, prep periods can be assigned to teachers. Details on this process are included in sections C and D.



Add Reservation Label

*Name:

*Short Name:

Type: Teacher
 Student
 Room

Scheduling Load:

Print on Reports

B. Assigning Meeting Patterns

Once the reservation labels have been created, go to *Course Offerings and Meeting Patterns* in *Step 5*. Find the *Reservation Labels* by searching for *Course subject area equals Reservation Labels*. Set the **Default Term Set** for *Year*, and the *Selected Patterns* to all available single periods for the Prep reservations. If a teacher might change prep periods at the semester, you could also set the *Semester* option to *Allowed Offering*.

If you have a two-day block schedule, the *Selected patterns* for *Prep-Day 1* would be periods 1, 2, 3, and 4. The *Selected patterns* for *Prep-Day 2* would be periods 5, 6, 7, and 8. If every teacher has a seminar in period 8, the *Selected patterns* for *Prep-Day 2* would only be periods 5, 6 and 7.

Scheduling Group	Term Set	Default Offering	Allowed Offering	Meeting Patterns
All Students	Quarter	<input type="radio"/>	<input type="checkbox"/>	0
All Students	Semester	<input type="radio"/>	<input checked="" type="checkbox"/>	4
All Students	Year	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	4

Select a default offering to make the course available for scheduling (deselect the default to remove the course from scheduling). This will determine the term set used for classes when they are initially created. Select allowed offerings to allow users to schedule classes manually to different term sets.

Meeting Patterns ^

Selected scheduling group/term set: All Students /Year

Available patterns:		Selected patterns:
Period 5 Period 6 Period 7 Period 8 Periods 1 & 2 Periods 1 & 5	<input type="button" value="→"/> <input type="button" value="←"/> <input type="button" value="All →"/>	Period 1 Period 2 Period 3 Period 4

C. Manually Assigning Prep Periods to Teachers

On the *Scheduling* page, click on *Master Schedule* in *Step 5*. Search for *Course subject area equals Reservation Labels*. Click *Add Class* for *Prep-Day 1*. Check the box in front of the class. Add the *Term*, *Meeting Pattern* and *Teacher* in the *Class Schedule* section. Repeat this process until each teacher has been assigned a prep period for Day 1. Then, change to the *Reservation Label* for *Prep-Day 2*, and assign the prep periods in a similar way.

If you have part-time teachers, they can be assigned multiple sections of a reservation label.

D. Automatically Assigning Teacher Prep Periods

The computer can automatically assign teacher prep periods when it builds the master schedule. To do this, you would use *Course Preferences*. Go to *Staff Setup* in *Step 1*. Open the page for the staff member. Click on *Course Search* in the *Course Preferences* section. Click on the *Detail* tab. (The *Basic* one does **not** work.) Search by *Course subject area equals Reservation Labels*. Click *Search*. Click *Add Criteria*. Click *Search*. To give a teacher a prep period each day, highlight both PD1 and PD2. Click *Add*. See sample screen below.

Basic | Detail

Category:

Search Criteria

Match: All Criteria Any Criteria

[Display All Records](#)

Search results:

<input checked="" type="checkbox"/>	PD1 - Prep-Day 1
<input checked="" type="checkbox"/>	PD2 - Prep-Day 2

Once the courses have been added to the *Preferred Courses* list for the teacher, you should change the *Preference* for the prep periods to 1. This will help to insure that the teacher gets a prep period on each day. It will **not** make it more difficult to schedule students.

When building the master schedule, the teacher will be assigned the prep period first. However, it will be moved to a different period on the same day to better accommodate student requests.

E. Creating Prep Periods

The fastest way to create multiple sections of prep periods is to go to the *Course Request Tally* window. In the *Course Search* panel, click on *Detail*. Set entries as shown below. Click on *Add Criteria*, and then click on *Search*. Enter the number of sections needed for each prep period in the *Classes Needed* column. Check the boxes at the left of each of these lines. Click *Actions*, and then click *Create Classes*. This will create the number of sections that you have requested.

Search Results ^

List: Total: 2

Selected: 0

<input type="checkbox"/>	Course Name	Course #	Prim Reqs	Alt Reqs	Unsched Primary	Alts Used	Opt Size	Avg Size	Classes Needed	Classes Created	Max Size	Lock
<input type="checkbox"/>	Prep-Day 1	PD1	1						25	0		<input type="checkbox"/>
<input type="checkbox"/>	Prep-Day 2	PD2	1						25	0		<input type="checkbox"/>

~ - Indicates calculated field override
! - Indicates class size above maximum or below minimum

F. Allocate Teachers

To allocate teachers, go to *Step 6* and click on *Teacher Allocations*. When you click on *Display All Records*, the *Reservation Labels* do not show up. To see them, use the Detail Course Search, and search for *Course subject area equals Reservation Labels*. The teachers for whom you have assigned a preference for these Reservation Labels will appear on the screen. You can easily allocate one (or more) sections of each label to each teacher.

G. Student Reservation Label

This feature does not work at the present time. Therefore, **please do not try to use it**. If a reservation label is attached to a student, the *Load Studentts* procedure will fail for all students.

Appendix G – Modifying Student Schedules Prior to Start of School

This document applies **only** to changing student schedules before the start of the 2006/2007 school year. By the time school starts, we expect to have upgraded to version 6.4. The instructions for changing schedules after the start of school will be different. It will be much easier than it was last year. You will be able to transfer attendance and marks from one section to another, where appropriate.

A. Automatically Scheduling a Single Student

There are a variety of ways to schedule a student. Each of these is described in this section. Most of them involve moving to the Schedule screen for the individual student

1. Enter Requests and Click New Schedule

.On the *Schedule* page for the student, click the *Course Requests* tab. Enter the requests (and alternates, if desired) by any of the methods described in **Appendix A**. Once the requests have been entered, click on the *New Schedule* button. This will automatically create a schedule for the student. If you are satisfied with the schedule, click *Save*. If you want to try another schedule, based on the same requests, you can click *Bookmark* to temporarily save this schedule, and then click *New Schedule* to try for an alternative schedule.

If you want some classes to stay where they are, and look at the possibility of moving others, you can lock the classes that you want to keep.

Check the *Lock* box at the end of the line for each class that you want to keep. These classes will remain in place, and other classes will be moved, if possible, when you click *New Schedule*.

2. Change Requests and Click New Schedule

You can change student requests, and then click *New Schedule*. This will create a new schedule based on the changed requests.

It is also possible to use the *lock* feature in this situation.

3. What Do All Those Symbols Mean?

After you have created a schedule, each of the **requests** will have an icon in front of it. The goal is to have the green check mark for each request. The meanings of the icons are shown below:

<input type="checkbox"/>	Status	Course Name	Course #
<input type="checkbox"/>		US History 8	SSU201
<input type="checkbox"/>		Language Arts 8	LAE201
<input type="checkbox"/>		Mathematics 8	MAM201
<input type="checkbox"/>		Integrated Sci III	SCG202
<input type="checkbox"/>		German I C	FLG101C
<input type="checkbox"/>		Seminar M	AAH101

No classes for this course

Course is scheduled

All classes for course are full

Available classes conflict with other course on student schedule

Alternate request is scheduled

4. Viewing Student Schedule

After the student has been scheduled, you can view the student schedule at the top of the *Schedule* page. If the courses are not sorted in period order, click on the words *Meeting Pattern* at the top of the column. This will sort the courses alphanumerically in order of the period codes. You can view all terms by setting the *View:* as shown below. You can change this option to see specific terms, or only full year courses. In this example, the *S1* indicates that it is a first semester course, *S2* indicates a second semester, and *Q* indicates quarter courses. The *Yr** for Beginning Band indicates that the student is taking part (one semester) of a year-long course. You can identify the specific semester by changing the *View*. For a fully scheduled student, the *Filled Scheduling Load* should equal the number of class periods available in the schedule.

View: Filled Scheduling Load: 8.00

Selected: 0 Total: 0

<input type="checkbox"/>	Term	Meeting Pattern ▲	Class Name	Teacher	Room	Details	Lock
<input type="checkbox"/>	Q3	P1	Speech A-1		101		<input type="checkbox"/>
<input type="checkbox"/>	Yr*	P1	Beginning Band M-1		404		<input type="checkbox"/>
<input type="checkbox"/>	Q4	P1	Study Skills-1		101		<input type="checkbox"/>
<input type="checkbox"/>	Yr	P2	Integrated Sci II-1		204		<input type="checkbox"/>
<input type="checkbox"/>	S2	P3	Outdoor Education AB-1		101		<input type="checkbox"/>
<input type="checkbox"/>	S1	P3	Reading 7 AB-1	Perron, Patricia	107		<input type="checkbox"/>
<input type="checkbox"/>	Yr	P4	World Geography 7-2	Sykes, Linda	105		<input type="checkbox"/>
<input type="checkbox"/>	Yr	P5	Physical Ed 7-1		501		<input type="checkbox"/>
<input type="checkbox"/>	Yr	P6	Language Arts 7-1	Perron, Patricia	107		<input type="checkbox"/>
<input type="checkbox"/>	Yr	P7	Mathematics 7-2	Marr, Ted	106		<input type="checkbox"/>
<input type="checkbox"/>	Yr	P8	Seminar M-3	Feletar, Gary	104		<input type="checkbox"/>

B. Manually Scheduling a Single Student

The steps described here may be used in conjunction with those described in section A. You can enter requests, and click New Schedule to get a start, or you can manually add each class.

1. Adding a Class

To **add** a class, go to the student *Schedule* page, and then click on the *Class Search* tab. You will then see a Search window similar to that shown below. You may select one, two, or three options. By using multiple restrictions, you can reduce the number of results in the search. In this example, I requested a course that had “Language in the name” and met in Period 3. There are additional options such as *Teacher* and *Term*. (**Note:** The **default** for the third line is Class Name. **This does not work**. Change it to Course Name or Course Number if you want to use this option.)

The screenshot shows a web interface with two tabs: "Course Requests" and "Class Search". The "Class Search" tab is active. Below the tabs is a "Class Search" window with two sub-tabs: "Basic" and "Detail". The "Basic" tab is selected. Under "Search by:", there are three rows of search criteria, each with a dropdown menu for the field, a dropdown menu for the operator, and a text input field for the value. The first row has "Term" as the field, "equals" as the operator, and an empty text box. The second row has "Meeting pattern" as the field, "equals" as the operator, and "Period 3" as the value. The third row has "Course name" as the field, "contains" as the operator, and "Language" as the value.

When the list of results appears, check the class that you want to add, and click *Add Class*.

All classes that are added manually will automatically be locked. You can lock, or unlock, a class by clicking the *Lock* box at the end each line. You can lock or unlock all classes by selecting the desired option from the *Actions* menu.

2. Dropping a Class

To **drop** a class, go to the student *Schedule* page. Click on the check box in front of the class(es) that you want to drop. Click the *Drop Class* button.

3. Transfer

To transfer a student from one class to another, place a check mark in front of the class to be dropped. Use the *Class Search* to find the class the student will transfer to, and check the box in front of this class. Click the *Transfer* button.

<input checked="" type="checkbox"/>	Term	Meeting Pattern	Class Name	Teacher	Room	Details	Lock
<input checked="" type="checkbox"/>	Yr	P2	Language Arts 7-2	Perron, Patricia	107		<input checked="" type="checkbox"/>

Class Search

Class Search Results

List:

Selected: 1 Total: 6

<input type="checkbox"/>	Status	Term	Meeting Pattern	Class Name	Room
<input type="checkbox"/>		Yr	P1	-Language Arts 10-1	
<input type="checkbox"/>		Yr	P1	Language Arts 8-1	
<input type="checkbox"/>		Yr	P2	Language Arts 7-2	107
<input checked="" type="checkbox"/>		Yr	P5	Language Arts 7-3	107

At this time, it doesn't matter whether you use the Add and Drop, or the transfer when changing between classes.

All changes done before the end of the school year will be done in the *Planning Calendar*. There is no *Change History*. All changes are effective the first day of school.

4. Adding the a Single Semester of a Year Long-Course

There is no change date option for adding a single semester of a year-long course. If you are manually scheduling a student for this situation, the following technique works. **Lock** all other classes on the student schedule. Go to the *Course Requests* section of the page. Add a request that specifies which semester you want the student to take the course. Click *New Schedule*. It will place him in the course only for the semester requested, without affecting other courses.

C. Mass Assign

You can use the Assign process to assign the same classes to multiple students. Select the students. Click *Actions*, click *Assign*, and then click *Classes*. Use the *Search* feature to find the classes, and add them to the list. (**Note:** The *Class Name* option does not work. Use *Course Name* or *Course Number*.) When the list is complete, click OK. This process will assign the selected *classes* to all of the selected students.

Class Search Results ^

List: "7" and "*"lang"* Total: 4

Selected: 0

<input type="checkbox"/>	Status	Term	Meeting Pattern	Class Name	Room
<input type="checkbox"/>		Yr	P2	Language Arts 7-2	107
<input type="checkbox"/>		Yr	P5	Language Arts 7-3	107
<input type="checkbox"/>		Yr	P6	Language Arts 7-1	107
<input type="checkbox"/>		Yr	P7	Language Arts 7-4	107

Classes to add/drop for selected students ^

Add Classes:

Integrated Sci III-1 (Term: Yr, Meets: P1, Room:)
 Mathematics 7-1 (Term: Yr, Meets: P6, Room: 106)
 Language Arts 7-2 (Term: Yr, Meets: P2, Room: 107)

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Appendix H – Scheduling Reports

There are many reports available for scheduling. This section lists some of the more useful ones.

A. Course Request Tally

To see the data for this report, go to the *Scheduling* module and click on *Course Request Tally* in *Step 6*. The report can be printed for all courses, or selected courses. You can change the columns to be displayed by clicking *Edit*, and then *Choose Columns*. You also have several sort options available – click *Edit*, and then click *Sort*. The example below shows a useful setup for this report.

<input type="checkbox"/>	Course Name	Course #	Prim Reqs	Alt Reqs	Unsched Primary	Alts Used	Opt Size	Avg Size	Classes Needed	Classes Created	Max Size	Lock
<input type="checkbox"/>	Art 7-8 A	ARA101	34	0	0	0	25	17	2	2	35	<input type="checkbox"/>
<input type="checkbox"/>	Beginning Band M	MUI101	34	1	0	1	25	17	2	2	35	<input type="checkbox"/>
<input type="checkbox"/>	German I M	FLG101	0	0	0	0	25	0!	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Integrated Sci II	SCG102	67	0	0	0	25	22	3	3	35	<input type="checkbox"/>
<input type="checkbox"/>	Integrated Sci III	SCG202	1	0	0	0	25	1	0	1	35	<input type="checkbox"/>
<input type="checkbox"/>	Journalism A	LAJE01E	0	0	0	0	25	0!	0	0	35	<input type="checkbox"/>
<input type="checkbox"/>	Language Arts 7	LAE101	69	0	0	0	25	17	~4	4	35	<input type="checkbox"/>
<input type="checkbox"/>	Mathematics 7	MAM101	68	0	0	0	25	23	3	3	35	<input type="checkbox"/>
<input type="checkbox"/>	Outdoor Education AB	PED103E	68	0	0	0	25	17	3	4	35	<input type="checkbox"/>
<input type="checkbox"/>	Pathways to Careers	VEZ101	34	0	0	0	25	17	2	2	35	<input type="checkbox"/>
<input type="checkbox"/>	Physical Ed 7	PEG104	68	0	39	0	35	23	~2	3	35	<input type="checkbox"/>

The *Prim Reqs* and *Alt Reqs* columns show how many students have requested this course as a primary or alternate request. After you run the *Load Students* process, the *Unsched Primary* column will show how many students were unable to be scheduled for the course. The *Alts Used* column will show how many students were scheduled for this course as an alternate request. By clicking on the number in any of these columns, you can obtain a list of the specific students in the group.

After you run the *Create Classes* process, the number of classes will show in the *Classes Created* Column. A tilde in front of the number in the *Classes Needed* column indicates that you have overridden the number calculated by the computer.

To print this report, click the printer icon in the upper right section of the screen.

Tip! – Courses will not appear on this list if you have not set the room requirements and at least one potential meeting pattern. This should be done in *Step 5 – Course Offerings and Meeting Patterns*.

B. Load Students Report

This report shows the *Requested Load* and *Scheduled Load* for all students. It is an excellent way to determine the effectiveness of your school schedule. Both columns should equal the number of periods available in your school for almost all students. The exceptions are part-time students, and those who will graduate in January.

There are several options for selecting students for this report. You can also sort in order of the *Requested Load* or *Scheduled Load* by click on the column headings.

<input type="checkbox"/>	Name	Gr	Requested Load	Scheduled Load
<input type="checkbox"/>	Adams, Jasmine K	7	8.0	7.0
<input type="checkbox"/>	Adeoti, Gabrielle S	7	8.0	7.0
<input type="checkbox"/>	Adorjan, Lindsey E	7	8.0	8.0
<input type="checkbox"/>	Alegado, Kristian D	7	8.0	6.0
<input type="checkbox"/>	Avalos, Elias C	7	8.0	8.0
<input type="checkbox"/>	Branham, Albert A	7	8.0	7.0
<input type="checkbox"/>	Carder, Sarah I	7	8.0	8.0
<input type="checkbox"/>	Clark, Whitney L	7	8.0	7.0
<input type="checkbox"/>	Coia, Jake E	7	8.0	8.0

To print the report, click on the printer icon in the upper right section of the screen.

C. Course Request List

This is a regular report that lists all of the students who have requested selected courses. It is actually more efficient to click the numbers on the *Course Request Tally* screen to get this information.

D. Scheduling Pre-check

This report is designed to be used **before** you use SMS to build a schedule. It shows discrepancies in setup data that would have a negative impact on the scheduling process. It contains the following sections:

1. Course-teacher Room Preference Discrepancies

The room type required for the course does not match any of the teacher room preference(s).

2. Course-Teacher Allocation Discrepancies

The number of teacher allocations for the course does not match the number of sections needed.

3. Teacher over/under-allocations

The teacher has too few or too many allocations.

To run this report click on *Reports* on the menu at the top of the *Scheduling* window. Click on *Schedule Analysis*, and then click *Scheduling Pre-check*.

E. Scheduling Configuration

This report summarizes the options that you entered in steps 3, 4, and 6 of the Scheduling window. It is a good summary to print after you have entered this data.

To run this report click on *Reports* on the menu at the top of the *Scheduling* window. Click on *Schedule Analysis*, and then click *Scheduling Configuration*

F. Course Request Rule Violations

This report is very helpful to determine problems with course requests. It will show students who have requested a course multiple times. It also shows students who have selected a course that may not be correct for the student grade level. There should be **NO** students below grade 9 who have selected courses that are listed for grades 9 through 12, and no students in grade 9 or higher who have selected middle school courses.

To run this report click on *Reports* on the menu at the top of the *Scheduling* window. Click on *Course Request Analysis*, and then click on *Course Request Rule Violation*.

G. Unscheduled Students

This report should **NOT** be run until almost all students are fully scheduled, as indicated in the *Load Students* report. It lists all of the students who are missing a class, by meeting code. If you have directed students to see a counselor during any period when they do not have a scheduled class, this report can be used to identify these students. If the report is printed before most students are fully scheduled, it will be very long, and not useful.

To run this report click on *Reports* on the menu at the top of the *Scheduling* window. Click on *Student Schedule Analysis*, and then click on *Unscheduled Students (List)*.

H. Student Schedule - List

This version is probably easier for students to read than the grid option shown in section I. To run this report click on *Reports* on the menu at the top of the *Scheduling* window. Click on *Student Schedule Analysis*, and then click on *Student Schedule - List*. A sample of this report is shown below.

Student Name: Adeoti, Gabrielle Sade				Schedule: 2006-2007
Grade: 7				
Homeroom: N/A				
Meets	Term	Class	Teacher	Room
P1	Q1	Pathways to Careers-2		104 (5924)
P1	Q2	Art 7-8 A-2		218 (5924)
P1	Q3	Study Skills-2		101 (5924)
P1	Q4	Speech A-2		101 (5924)
P2	Yr	World Geography 7-1	Sykes, Linda	105 (5924)
P4	S1	Outdoor Education AB-4		
P4	S2	Reading 7 AB-4	Perron, Patricia	107 (5924)
P5	Yr	Integrated Sci II-3		204 (5924)
P6	Yr	Language Arts 7-1	Perron, Patricia	107 (5924)
P7	Yr	Mathematics 7-2	Marr, Ted	106 (5924)
P8	Yr	Seminar M-3	Feletar, Gary	104 (5924)

I. Student Schedule – Grid

This is the other version of the student schedule. It is more difficult to read because it does not identify the periods. To run this report click on *Reports* on the menu at the top of the *Scheduling* window. Click on *Student Schedule Analysis*, and then click on *Student Schedule - Grid*. A sample of this report is shown below.

Student Name: Adeoti, Gabrielle **Grade:** 7 **Homeroom:** N/A

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Day 1	Day 2
Q1 (8/23-11/3) 104 (5924) Pathways to Careers-2	Yr (8/23-6/16) 204 (5924) Integrated Sci II-3
Q2 (11/6-1/26) 218 (5924) Art 7-8 A-2	
Q3 (1/29-4/6) 101 (5924) Study Skills-2	
Q4 (4/16-6/15) 101 (5924) Speech A-2	
Yr (8/23-6/16) 105 (5924) World Geography 7-1 Sykes, L	Yr (8/23-6/16) 107 (5924) Language Arts 7-1 Perron, P
	Yr (8/23-6/16) 106 (5924) Mathematics 7-2 Marr, T
S1 (8/23-1/27) Outdoor Education AB-4	Yr (8/23-6/16) 104 (5924) Seminar M-3 Feletar, G
S2 (1/29-6/16) 107 (5924) Reading 7 AB-4 Perron, P	

J. Teacher Matrix by Day and Period

This report can be very long, especially if you have quarter classes. It also does not show specific classes if the teacher has multiple classes in the same period. The *Teacher Schedule – List* is probably a better report to use. The *Teacher Matrix by Meeting Pattern* does not work.

. To run this report click on *Reports* on the menu at the top of the *Scheduling* window. Click on *Teacher Schedule Analysis*, and then click on *Teacher Matrix – by Day and Period*. A sample of this report is shown below.

Term: Quarter 1 **Day:** Day 1

Scheduling Group: HS

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Period:	P1	P2	P3	P4
Farrell, Brian	Biology-1-Yr 204 19/30	Biology-2-Yr 204 21/30	Biology-3-Yr 204 19/30	
Feletar, Gary	LI 1-Yr *Multiple Conflict		-Language Arts 10-5-Yr	LI 2-Yr *Multiple Conflict
Flagg, Evamaria	Span 2-2-Yr 217 15/60	Span 2-1-Yr 217 22/60	Span 1-2-Yr 217 29/60	
Gamble, Richard				
George, Marcus	Career Pract - 2hr-1-Yr	Career Pract - 1hr-2-Yr	Ball Control Sports-7-Yr	Career Pract - 1hr-4-Yr
George, Michele				
Giubilato, Joanne	Art 7-8 AB-1-S1 218 19/30	Video 1-Yr *Multiple Conflict	Video 2-Yr *Multiple Conflict	
Hauck, Comfort	Language Arts 8-1-Yr		Reading 8 A-1 109 16/30	Language Arts 8-2-Yr
Jimerson, Michael	PEMS 1-S1 501 26/60	Ball Control Sports-1-Yr		Ball Control Sports-3-Yr
Keilty, Anne				
Keilty, Patrick		ALG I 2-Yr 315 13/60	ALG I 4-Yr 315 14/60	Mathematics 8-1-Yr 315 23/30

K. Teacher Schedule - List

This report prints one teacher per page, but does show all classes and terms.

To run this report click on *Reports* on the menu at the top of the *Scheduling* window. Click on *Teacher Schedule Analysis*, and then click on *Teacher Schedule - List*. A sample of this report is shown below.

Teacher Schedule Ansbach High School

Teacher Name: Blachly, Cynthia
Department:
Homeroom:

Schedule: 2005-2006 150405

Meets	Term	Class	Room	# of Students
P2	Yr	Computer Art-4	218 (5924)	1/30
P2	Yr	Fundamentals of Art-1	218 (5924)	6/30
P2	Yr	AP Studio Art Draw+-1	218 (5924)	0/30
P2	Yr	Studio Art-1	218 (5924)	6/30
P3	Yr	Computer Art-2	218 (5924)	3/30
P3	Yr	Fundamentals of Art-2	218 (5924)	3/30
P3	Yr	AP Studio Art Draw+-2	218 (5924)	0/30
P3	Yr	Studio Art-2	218 (5924)	7/30
P4	Yr	Fundamentals of Art-3	218 (5924)	0/30
P4	Yr	Studio Art-3	218 (5924)	6/30
P4	Yr	Computer Art-3	218 (5924)	0/30
P4	Yr	AP Studio Art Draw+-3	218 (5924)	0/30
P5	Yr	Fundamentals of Art-4	218 (5924)	6/30
P5	Yr	Studio Art-4	218 (5924)	7/30
P5	Yr	Computer Art-1	218 (5924)	2/30
P5	Yr	AP Studio Art Draw+-4	218 (5924)	0/30
P6	Yr	Fundamentals of Art-5	218 (5924)	2/30
P6	Yr	AP Art History+-1	218 (5924)	7/30
P8	Yr	Seminar-2	218 (5924)	14/30
P8	Yr	Studio Art-5	218 (5924)	1/30

L. Print From Master Schedule Screen

Another option is to print a master list of teacher schedules from the *Master Schedule* window. From the Scheduling module, click on Master Schedule in Step 5. Click the *Teacher* tab. Click *Display All Records*. To order the list by *Meeting Pattern* for each teacher, click on the column heading *Meeting Pattern*. (This works on the screen, but when you print the report, classes will be in class name order for each teacher.) Click on the printer icon in the upper right section of the screen to print this report. A sample is shown below.

Master Schedule: By Teacher

552 total

Status	Term	Meeting Pattern	Class Name	Room	# Students	Lock
Administrator, Admin (FTE: 0/1)						
Ballard, Elizabeth (FTE: 1/1)						
	Yr	P3	AP English Language+-1	318	10 (10)/30	
	Yr	P4	HonorsLit-WrldHist9-1	318	22 (22)/30	
	Yr	P5	HonorsWrldHist-Lit9-1	318	22 (22)/30	
	Yr	P2	Language Arts 9-1	318	10 (10)/30	
	Yr	P8	Seminar-1	318	11 (11)/30	
	Yr	P7	Shakespeare-1	318	13 (13)/30	
Blachly, Cynthia (FTE: 3.33/1)						
	Yr	P6	AP Art History+-1	218	7 (7)/30	
	Yr	P2	AP Studio Art Draw+-1	218	0 (0)/30	
	Yr	P3	AP Studio Art Draw+-2	218	0 (0)/30	
	Yr	P4	AP Studio Art Draw+-3	218	0 (0)/30	
	Yr	P5	AP Studio Art Draw+-4	218	0 (0)/30	
	Yr	P5	Computer Art-1	218	2 (2)/30	
	Yr	P3	Computer Art-2	218	3 (3)/30	
	Yr	P4	Computer Art-3	218	0 (0)/30	
	Yr	P2	Computer Art-4	218	1 (1)/30	
	Yr	P2	Fundamentals of Art-1	218	6 (6)/30	
	Yr	P3	Fundamentals of Art-2	218	3 (3)/30	
	Yr	P4	Fundamentals of Art-3	218	0 (0)/30	
	Yr	P5	Fundamentals of Art-4	218	6 (6)/30	

Appendix I – Middle Schools

Wheels and Teams

A. Exploratory Wheels

These instructions are intended for the scheduling of 9-week exploratory courses in middle schools. They can easily be modified and adapted for semester exploratory courses.

Be very careful in working with these courses to select the correct course(s). Many have similar names. For example, in seventh grade, we have two quarter courses, a semester course, and a full year course available for PE. **A student is not allowed to repeat the same course in a single year.** The goal of the exploratory program is to have the student experience a variety of courses.

You can automatically schedule students into a rotating wheel by setting the sections and *Class Loading Rule* correctly. An example of setting the sections is shown below. The section numbers are shown in the boxes.

Subject/Term	Q1	Q2	Q3	Q4
Subject A	1	4	3	2
Subject B	2	1	4	3
Subject C	3	2	1	4
Subject D	4	3	2	1

After courses are set up as shown above, you should set a Class Loading Rule as described here. Choose *Same/different attributes* rule. Always schedule the selected courses *With exactly the same Class Number*. Select the four courses in the wheel. When students are scheduled, they will have the same section number for these courses for each term. In this way, they will cycle through the wheel.

Rule type: Course sequencing rule
 Same/different attributes rule
 Course load balancing rule

Complete the following two phrases and select courses to define the rule.

1. [Select courses](#)

2.

Always schedule [Course Name(s)] with exactly the same class number.

B. **Teams** - This section is only for large middle schools that use team teaching.

1. Setting the Teams

Click on *Team Loading Rules* in *Step 4* of the *Scheduling* screen. Click *Actions*, and then click *Add Team*. Add the team *Name* and *Code*. Use meaningful short codes so that you can easily identify them on other pages.

The default is to allow overlap with other teams. In most cases, you will probably want to keep the teams separate for the academic classes. To do this, move the other teams to the *Do not allow overlap with teams:* box. The other teams will not appear on this screen until after they have been created. Therefore, you may need to edit teams that were entered previously. To do this, select the team that you want to edit, click *Actions*, and then click *Edit Team*.

Assign all of the teachers who will be teaching the core classes for this team to the team. A teacher may be assigned to more than one team.

The screenshot shows the 'Add Team' interface. At the top, there are two input fields: '*Team name:' with the value 'White' and '*Code:' with the value 'W'. Below these are two boxes for team overlap settings. The left box is labeled 'Allow overlap with teams:' and is currently empty. The right box is labeled 'Do not allow overlap with teams:' and contains the text 'Blue' and 'Red'. Between these two boxes are two buttons: 'Add >' and '< Remove'. Below the overlap settings is a section titled 'Team Members'. It contains a search bar with the text 'Search' and an upward arrow. Underneath the search bar is a 'Search by:' dropdown menu set to 'Last name', followed by a search input field. There are 'Search' and 'All Staff' buttons. Below the search bar is another section titled 'Search Results And Selected Staff' with an upward arrow. It contains two boxes: 'Available Staff:' and 'Selected Staff:'. The 'Available Staff:' box lists: Placeholder - Peterson, Administrator, Admin, Ballard, Elizabeth, Breeding, Canita, Bruce, Larry, and Cook, Janet. The 'Selected Staff:' box lists: Blachly, Cynthia and Childress, Howard. Between these two boxes are 'Add >' and '< Remove' buttons.

2. Assigning Classes to Teams

To assign classes to specific teams, use the Master Schedule screen. Click on the check box in front of the class. Enter the team name in the *Team* box in the *Class Information* section. Classes, such as electives, that are not assigned to a specific team will be open to all students.

The screenshot shows the Master Schedule interface. At the top, there is a table with columns for checkboxes, class names, years, periods, teachers, room numbers, and student counts. Below this is the 'Class Information' section with various input fields and dropdown menus.

Mathematics 7 (MAM101)								Add Class
<input checked="" type="checkbox"/>	Mathematics 7-1	Yr	P6	Marr, Ted	106	29 (29)/30	<input type="checkbox"/>	
<input type="checkbox"/>	Mathematics 7-2	Yr	P7	Marr, Ted	106	27 (27)/30	<input type="checkbox"/>	

Class Information

*Name: Program Class:

*Number: Track Pgm. Att.:

*Capacity:

Code:

*Scheduling group:

Class comment:

Team: [Custom...](#)

Team name goes here.

3. Assigning Students to Teams

The system will randomly assign students to teams. However, you can easily control which students are on which team. Assign one or more students to a specific class for a team. **Lock** this class on the student(s) schedule. When the loader is run, the student will be restricted to classes listed for that term. You could use the *Assign* process to assign groups of students to specific classes. However, they will still have to be **locked** individually.

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Appendix J – Miscellaneous Tips

I. Search Problems

There are several places in Version 6.3 where the *Search* option does not operate as expected. If you expect data from a search to appear in a box labeled *Available ...*, and nothing appears, try the *Detailed Search*. Click on the *Detail* tab, instead of the *Basic* tab. Enter your search criteria. This usually works.

II. Modify Class Sizes

If you are expecting many new students for whom you do not have course requests, there is a way to temporarily modify class sizes. By lowering the optimum and maximum class sizes in the spring, you can get a more realistic schedule. The number of sections created will be more representative of what you will need in the fall. This will also result in more balanced class sizes when you load students.

This process is done on the *Course Request Tally* screen. The default settings for class size are an optimum size of 25 and a maximum size of 35. You can change the *Optimum* and *Maximum* class sizes individually for each course. There is a shortcut if you want to change the sizes for all, or a large number, of courses. On the *Course Request Tally* screen, **select** one course and change the values in the *Opt Size* and *Max Size* columns. Click *Edit*, and then click *Copy Fields*. Check the boxes for Maximum Class Size and Minimum Class Size, as shown below.

Fields to Copy	
Selected: 2	Total: 3
<input type="checkbox"/>	Course Offering fields
<input type="checkbox"/>	Minimum class size
<input checked="" type="checkbox"/>	Maximum class size
<input checked="" type="checkbox"/>	Optimal class size

Move the desired courses from the *Available Course Offerings* box to the *Selected Course Offerings* box. Click *OK*.

After the class sizes have been changed, click *Actions*, and then click *Create Classes*. This will create class sections based on the revised numbers.

In August, after course requests have been entered for new students, you can increase the class sizes. You can run the *Calculate Classes Needed* again to verify that you have the necessary number of sections for each course. Do **not** run *Create Classes* again. This would destroy your master schedule.

III. Balancing Class Sizes

If class sizes for a course are really out of balance, you could try changing the maximum class size to make it closer to the optimum class size. Then, run the student loader just for students in the affected classes. This won't help if the problem is due to a poor master schedule. In a large school, with multiple sections, it may be helpful.

If the above technique still does not produce the desired result, you could try clearing the students' schedules. The scheduler may work more effectively without any students scheduled. See section IV below for directions on clearing classes.

If you have modified class sizes temporarily to balance classes, be sure to set the numbers back to the original sizes to avoid getting error message when trying to schedule new students.

IV. Clearing Student Schedules

If you change a meeting pattern for a class that already has students scheduled, you may have to change student schedules to avoid conflicts. Before changing the meeting pattern, select the students and drop the class from their schedules. After the change in meeting pattern, rschedule these students.

If you are changing many meeting patterns, it may be advisable to clear the student schedules. There are four steps to this process:

1. Create a course that cannot be scheduled. That is, set the *Max Size* to 0.
2. Add a primary request for this course to all of the students whose schedules you want to clear.
3. On the *Student Loader Options* page, set the *If a student has more than x unscheduled requests, do not schedule* option to **1**.
4. Run *Load Students*.

This process will remove all scheduled classes for the selected students.