



Focus University Instructional Guide

Topic: Master Schedule Builder

February 2020

Purpose: At the Secondary level, student requests drive decisions related to the master schedule building process. The Focus **Master Schedule Builder** analyzes entered requests, evaluates section and teacher allocations, and allows users to create or remove sections. The builder algorithm will determine the best period for each section, in order to optimize the scheduling of student requests. Schools can also use the Builder to create all sections from scratch.

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Training Site URL (Use Chrome or Firefox only):

xxx.focusschoolsoftware.com/xxx

Pre-Builder Process

- ✓ Ensure that all work in the Builder takes place in the upcoming school year.
- ✓ **Verify Non-Student Data**
 - From the **School Setup** menu, verify that **Periods**, **Attendance Calendars** and **Marking Period** dates are accurate. This should be done even if building sections from scratch.
 - From the **Scheduling** menu, verify that the organization and settings of the **Subjects** and **Courses** are all updated and accurate. This also applies if building from scratch.
 - Ensure that any unnecessary **Courses** have been or are removed.
 - Ensure any **new courses** are added at the school level before requests can be entered.
- ✓ **Student Requests**
 - Ensure that all **Student Requests** are entered into Focus.
 - Review and clean the **Request Reports (Scheduling > Reports > Requests Reports)**. It is very important to have all student requests entered and accurate in order to maximize the outcome when running the **Builder**.



Alert:

- **DO NOT** make changes to **Courses and Sections** or the **Teacher Schedules Report** until finished with the **Builder**.
- Student requests must be in Focus and accurate in order to maximize the outcome.
- Once each of the steps from the **Pre-Builder Process** has been completed, the school is ready to begin working with the **Master Schedule Builder**.

Master Schedule Snapshot

Create a new **Master Schedule Snapshot** to reflect the current **Master Schedule** before the **Builder** is run.

1. Go to the **Scheduling** menu and select **Master Schedule Snapshots**.
2. Click **Create Snapshot**.
3. Enter a **Description** for the **Snapshot** instance.
4. Click **Save**.

Create Snapshot Save

Filter: OFF

	Restore	By	Date	Description	Percent Scheduled	# Sections
	Restore	Tolbert, Holly	02/05/2020 4:35pm	High School	100	444
	Restore	Tolbert, Holly	02/05/2020 12:56pm	9th Grade	100	444
	Restore	Tolbert, Holly	01/30/2020 11:17am	Rotation Days	100	444
	Restore	Tolbert, Holly	01/08/2020 11:24am	6th Grade	0	443
	Restore	Tolbert, Holly	01/07/2020 1:31pm	Original	0	442

Master Schedule Builder: Step-By-Step Guide

The **Master Schedule Builder** helps schools to optimize the match between the student course requests and staff resources with the number of sections and periods that will be needed.



Tip: The Builder works most effectively when few constraints are placed on where and when sections can be scheduled.

1. The next school year should be showing in the school year drop-down.

Master Schedule Builder

Holly Tolbert (System ...
Meadow Valley School
2020-2021
2nd 9 Weeks
SIS
ERP

2. Go to the **Scheduling** menu and select **Master Schedule Builder**.

Step 1: Scenarios

Schedulers can create multiple scenarios for different combinations of teachers, sections, and periods to find the best possible combination.

- By default, there will be a scenario called **Initial** scenario. This can be renamed and saved.
This Initial scenario contains NO information.
1. On the first Builder run, click the **Setup** tab at the top to proceed.

Scenario	Title	Requests Scheduled	Fully Scheduled	Last Run Date	Duplicate
2	Rotation Day Trial				Duplicate
1	Initial	95.29%	100.00%	02/13/2020	Duplicate

- **Duplicate** - Creates an exact copy of the selected run, which can be renamed and adjusted.
- **New Scenario** - Enter a Title in the top line. Click Save.
- **Select Scenario** - Select a scenario to use with the drop-down in the top right corner.

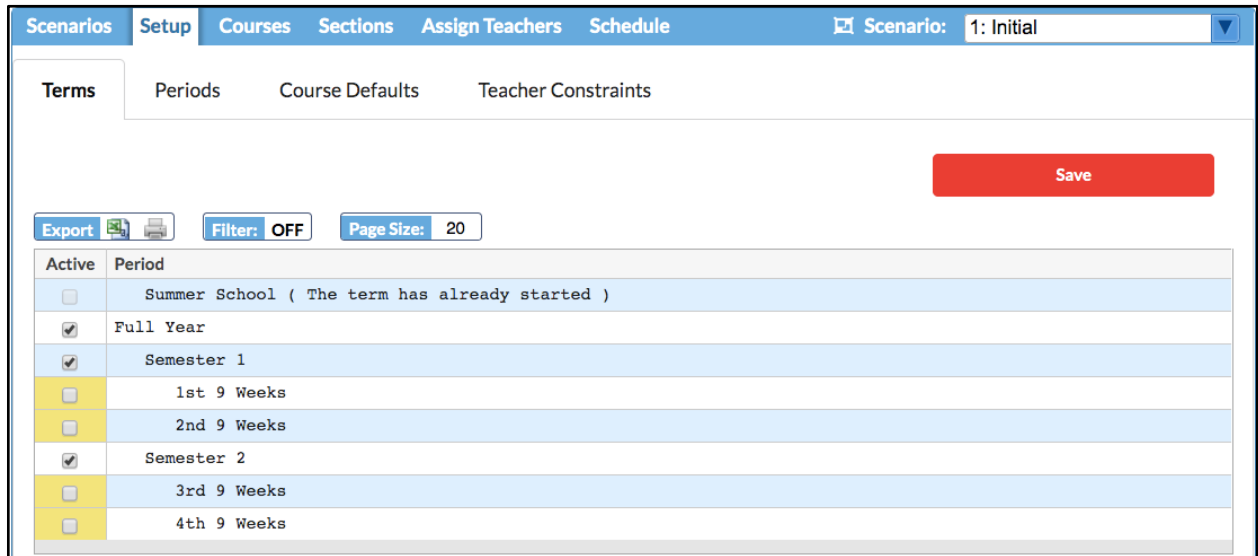
Step 2: Setup

The Setup tab displays 4 sub-tabs to customize the builder with the necessary information.

Terms

The **Terms** sub-tab will establish marking period terms to be scheduled.

1. Click the **Setup** tab.
2. Click the **Terms** sub-tab.
3. Deselect/Select the **Active** box for the terms that apply to the school.
 - By default, all marking periods that are not active are checked.
4. Click **Save** in the top right corner.



Scenarios Setup Courses Sections Assign Teachers Schedule Scenario: 1: Initial

Terms Periods Course Defaults Teacher Constraints

Save

Export Filter: OFF Page Size: 20

Active	Period
☐	Summer School (The term has already started)
☒	Full Year
☒	Semester 1
☐	1st 9 Weeks
☐	2nd 9 Weeks
☒	Semester 2
☐	3rd 9 Weeks
☐	4th 9 Weeks



Alert:

- If the school is **NOT** a 4x4 school, select **Full Year**, **Semester 1**, **Semester 2**.
- 4x4 schools use the **Semesters** and **Quarters** only.
- If the terms show as '**Already in session**', the **Marking Period Setup** needs to be updated with the new school year dates before continuing. Make sure you are in the next school year.

❏ Periods

The **Periods** sub-tab will establish periods to be scheduled.

- By default, this will pull in ALL periods. The selected/deselected option for **Use for Scheduling** on the **Periods** menu (outside of the Builder - **Setup > Periods**) will carry over to this screen.
1. Click the **Setup** tab.
 2. Click the **Periods** sub-tab.
 3. Uncheck periods that the **Master Builder** will not use for scheduling sections.
 - If a Homeroom period exists, but will not be scheduled through requests, do **NOT** check the Homeroom period because the **Builder** will use this period to assign other sections.
 4. Click **Save** in the top right corner.

The screenshot shows the 'Setup' tab selected, with the 'Periods' sub-tab active. The interface includes a top navigation bar with tabs: Scenarios, Setup, Courses, Sections, Assign Teachers, and Schedule. A dropdown menu shows 'Scenario: 1: Initial'. Below the tabs are sub-tabs: Terms, Periods (selected), Course Defaults, and Teacher Constraints. A 'Save' button is in the top right. Below it are 'Export' (with icons), 'Filter: OFF', and 'Page Size: 20'. A table lists periods with an 'Active' checkbox and a 'Period' name.

Active	Period
☐	Homeroom
☒	Period 1
☒	Period 2
☒	Period 3
☒	Period 4
☒	Period 5
☒	Period 6
☒	Period 7

❑ Course Defaults



Alert:

- This is **Course Defaults**. Keep in mind that selections made here might not apply to ALL sections.
- District can also set defaults in the **Course Catalog** for the Schools.
- Once the Builder is no longer being used, the fields on Course Defaults can also be mass updated from the **Master Schedule Report**.

The **Course Defaults** sub-tab will establish the course properties to include in the final schedule. Existing information will pull into the Builder.

Scenarios Setup Courses Sections Assign Teachers Schedule Scenario: 1: Initial

Terms Periods **Course Defaults** Teacher Constraints

Color Legend

- Not all sections have the same setting
- Couldn't find any settings
- This section was created by the master scheduler this year.

Save

Prev Page: 1 / 62 Next Export Filter: OFF Page Size: 5 Mass Update

Number	Course	Meeting Days							Takes	Attendance	Graded	GPA	Calendar		
		Sun	Mon	Tue	Wed	Thur	Fri	Sat							
0101005	M/J EXPLORING 2D ART	☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Standard District Calendar	Ur
0101300	2-D STUDIO ART 1	☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Standard District Calendar	Ur
0101310	2-D STUDIO ART 2	☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Standard District Calendar	Ur
0101320	2-D STUDIO ART 3 HON	☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Standard District Calendar	Hc
0101330	3-D STUDIO ART 1	☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	Standard District Calendar	Ur

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Option 1 – Individual Course Defaults

1. Use the checkboxes in line with the course to apply properties. This information is usually supplied by the **Course Catalog** (if applicable).
2. Click **Save**.

Option 2 – Mass Update Course Defaults

1. Turn on Filters.
2. Filter the appropriate Course(s).
3. Click **Mass Update**.
4. Select the necessary column and corresponding option.
5. Click **Update**.
6. The changed information turned yellow.
7. Verify the information on each page is correct.
8. Click **Save**.

Fields

- **Number** - Displays the **Course Number**. Cannot be changed.
- **Course** - Displays the **Course Title**. Cannot be changed.
- **Meeting Days** - Select the **Meeting Days** appropriate for the Course.
- **Takes Attendance** - Select if this course **Takes Attendance**.
- **Graded** - Select if this Courses enters **Grades**.
- **Affects GPA** - Select if this Course affects the student's **GPA**.
- **Calendar** - Select the appropriate **Attendance Calendar** for the Course.
- **Grading Scale** - Select the appropriate **Grading Scale** for the Course.
- **Stacking** - Indicates any classes that occur with the same teacher in the same period.
 - Courses from last year's master Schedule that were scheduled in the same period will be in this column.
 - Ex: Band 1, 2, 3 happen during period 3 with Mrs. Smith.
 - This can be semester or full year. Semester must be different courses in order to show in the stacking column. If it is the same course, just S1 and S2, it will not show in the stacking column.
 - Hover over the drop-down to see ALL the stacked classes.
- **Default Marking Period** - Select the correct **Marking Period** for the Course.

❑ Teacher Constraints

The **Teacher Constraints** sub-tab will establish any restrictions on scheduling teachers.

Teacher	Rooms	Periods Available	Consecutive Periods Allowed	Max Periods	Allowed Courses	Allowed Subjects
Abagnale, Susan : 23158	05 5201				ENC1101 English Comp ...	
Abbott, Dabney : 4782	07 7204				0101300 2-D STUDIO A...	
Acasio-Cortez, Juanita : 12157						
Acosta, Lorena : 2957						
Aguayo, Denise D : 6936						
Aguayo, Mina : 26456	02 2201				1001370 ENG 3, 796308...	

1. Complete the appropriate fields.

- **Teacher** - Displays The teachers in the list represent the upcoming school year not necessarily the current school year.
- **Rooms** - Select one or multiple rooms for the teacher.
- **Periods Available** - If periods are selected, this will limit the Builder's flexibility.
 - This might be useful if trying to schedule the same planning for a group of teachers. Select all periods except the period for planning. Click **Save**.
- **Consecutive Periods Allowed** - Enter the number of periods the teacher can consecutively teach.
- **Max Periods** - Enter the number of periods the teacher is available in a day. This will help to achieve maximum results in the Builder.
 - If **Max Periods** is left blank, the Builder will give the teacher as many sections as is built for the teacher.
- **Allowed Courses** - This will automatically pull in the course(s) the teacher has taught for 3 years of history.
 - If this is blank, select the **Course(s)** the teacher is certified to teach.
- **Allowed Subjects** - Select the Subject(s) the teacher is certified to teach, which will include any course in that Subject area.

2. Click **Save**.



Tips: Fill in as much information about the teacher as possible. To get the best results, either the **Allowed Courses** or **Allowed Subjects** column should be filled in to ensure the teacher gets an assigned section. Setting both **Allowed Courses** and **Allowed Subjects** for a teacher acts as an OR condition.

Step 3: Courses

The **Courses** tab is used to add, edit, or delete sections in the master schedule. In the work area, the maximum number of students allowed to be scheduled into new sections, the number of student requests for the course, the number of sections needed to accommodate student requests, and the current number of sections are provided for each course in order to help make decisions on whether new sections are needed or existing sections can be deleted.



Alert: If Building from Scratch:

- Do NOT click **Import Sections from Master Schedule**.
- Skip ahead in this document to **Add New Sections**.
- The Florida fields for each section will need to be filled in after the Builder has been run. This can be done within **Courses & Sections** or from the **Master Schedule Report**.



Tips: The fastest way to build an optimized master schedule is to import sections from the master schedule without periods, and then optimize the number of sections.

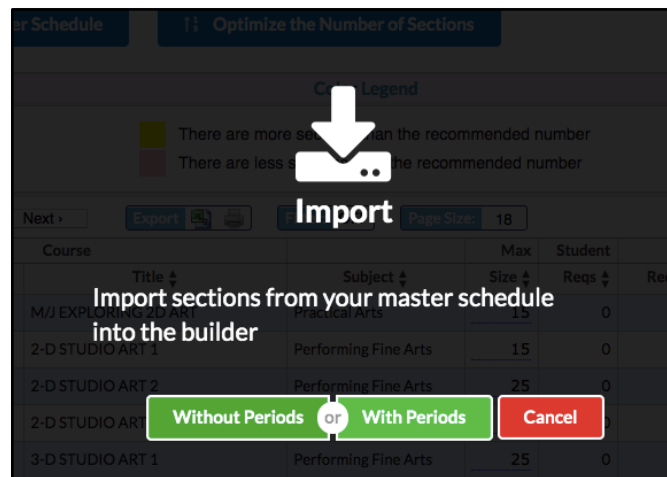
Importing the Master Schedule will import existing sections into the builder. **All existing COURSES** will be displayed on this screen whether or not sections exist. **All student requests should be completed prior to this step.**

1. Select **Import Sections from Master Schedule**.

Focus Training: Master Schedule Builder - Admin

Add/Edit	Sections	Number	Course	Title	Subject	Max Size	Student Reqs	Recommended	Current	Optimize
		1001370	ENG 3	English	English	25	109	5	0	☒
		2001340	ENV SCI	Science	Science	15	109	8	0	☒
		1206310	GEO	Math	Math	25	109	5	0	☒
		1205070	M/J GRADE 8 PRE-ALG	Math	Math	22	109	5	0	☒
		1508050	M/J IND/DUAL SPT GD8	Physical Education	Physical Education	25	109	5	0	☒

2. A pop-up allows the option to **Import sections from the Master Schedule Without or With periods.**



- a. **With Periods** - This is the same as the **Master Schedule Snapshot**. This will keep the periods currently set on the Master schedule and the Builder will not produce a new schedule. If a Snapshot has already been created, this is unnecessary.
- b. **Without Periods** - Removes the periods set on the current Master Schedule and allows the Builder to select which period works best with the given requests. **This is the ideal setting to get the optimal results from the Builder. If this option is selected, and the remaining steps are followed, the existing Master Schedule will be gone (unless a Snapshot was created).**

❑ Course Tab Navigation

Whether starting from scratch or using the existing Master Schedule, sections will need to be built or adjusted. Here are some options to help navigate through the screen.

Scenarios

Setup

Courses

Sections

Assign Teachers

Schedule

Scenario: 1: Practice

Import Sections from Master Schedule

Optimize the Number of Sections

Save

Color Legend

There are more sections than the recommended number

There are less sections than the recommended number

Prev

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Next

Export

Filter: OFF

Page Size: 18

Mass Update

Add/Edit	Course			Max	Student	Sections		
Sections	Number	Title	Subject	Size	Reqs	Recommended	Current	Optimize
	1200310	ALG 1	Math	25	82	4	4	☒
	2003340	CHEM 1	Science	25	82	4	4	☒
	1001310	ENG 1	English	15	82	6	6	☒
	1001400	ENG 4	English	25	81	4	4	☒
	2002500	MARINE SCI 1	Science	0	81	0	0	☐
	2103300	WORLD CLTRL GEOG	Social Studies Electives	15	81	6	6	☒
	1302330	BAND 4	Performing Fine Arts	25	9	1	1	☒
	0101300	2-D STUDIO ART 1	Performing Fine Arts	15	0	0	4	☐

- **Color Legend** - Defines highlight colors for the Current Sections column.
 - A **red highlight** indicates the number of available sections is less than the recommended number based on requests.
 - A **yellow highlight** indicates there are more sections than the recommended number based on requests.
- **Add/Edit Sections** – Select Button **Add/Edit** a sections.
- **Course Number/Title** - Displays the title and course number as specified by the Course Catalog or during Course creation.
- **Subject** - Displays the Subject of the Course.
- **Max Size** - Displays the maximum number of seats assigned to the sections.
- **Student Reqs** - Displays the total number of student requests for each course.
- **Recommended** - Displays the recommended number of sections based on **Student Requests** and **Max Size**.
- **Current Sections** - Displays the current number of imported sections for the course. **This**

column will show zeroes if the Master Schedule was not imported.

- **Optimize** - Check/Uncheck this to have the system create/remove sections based on the recommendation column. This can help if the school wants the system to create/remove necessary/unnecessary sections.
 - By default, if a section is unchecked, there might be requests with no sections. The school probably didn't offer the course last year. This also happens if there are sections, but NO requests.
 - By default, **if** a section is checked, there are requests and sections.
- **Pages** - switch from one page to another.
- **Export** - export options
 - **Excel** - Export the Courses tab to an excel spreadsheet.
 - **Print** - Print out the Courses tab.
- **Filter** - turn this on to filter for specific criteria
- **Page Size** - Increase or reduce the number of rows on the page
- **Mass Update** - update information all at once. The Max Size or Optimize could be Mass Updated to save time. Make sure to use Filters to Mass Update specific information.



Tip: The **Builder** is only recommending what should be done. More or less sections can be created based upon the needs of the school and available staff.



Alert: Click **Save** before proceeding to the next page. This screen is NOT an auto save.

❑ Manually Add New Sections

New sections can manually be created for a Course within the Builder. **If manually creating sections from scratch, this is where to begin.** To automatically add new sections, move to the next section in the document.

1. In **Add/Edit Sections** column, select the **radio** button next to the appropriate course.

Add/Edit	Course			Max	Student	Sections		
Sections	Number	Title	Subject	Size	Reqs	Recommended	Current	Optimize
☐	1200310	ALG 1	Math	25	82	4	4	☒
☐	2003340	CHEM 1	Science	25	82	4	4	☒
☐	1001310	ENG 1	English	15	82	6	6	☒
☐	1001400	ENG 4	English	25	81	4	4	☒
☒	2002500	MARINE SCI 1	Science	0	81	0	0	☐
☐	2103300	WORLD CLTRL GEOG	Social Studies Electives	15	81	6	6	☒

Any current sections will display.

X

Save

Export

Filter: OFF

Page Size: 20

Mass Update

Teacher Schedule	Teacher	Max Size	Room	Lock Period	MP	Period	How Many?
		0			FY		1
☒	Acasio-Cortez, Juanita 1...	0			FY		
☒	Acasio-Cortez, Juanita 1...	0			FY		

Color Legend

The course is not allowed for the teacher

2. In the top row, enter the necessary information to add a new section.
 - a. **Teacher** - Select the **Teacher** for this section.
 - b. **Max Size** - Set the max number of seats in this section if different from the **Default Max Class Size**.
 - c. **Room** - Enter the **Room** number where the section will be taught.
 - d. **Lock Period** - If applicable, use **Lock Period** to select a required period for the section to be scheduled.

- e. **MP** - If applicable, use **MP** (Marking Period) to change from the default **FY**.
 - f. **Period** - This will populate with the section period AFTER the Builder has been run.
 - g. **How Many** - Select how many sections to create at one time. Multiple sections can be created at once to save time.
3. Click **Enter** on the keyboard to enter a new record.
 - If multiple sections were created at once and Enter is selected, the selected number of sections will be created.
 4. Click **Save**.

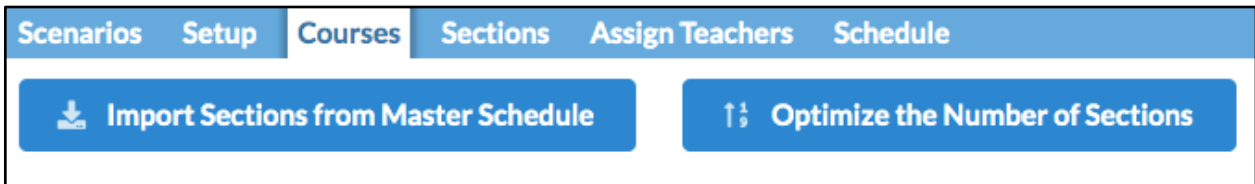


Tip: If manually adding sections, continue to [Add New Sections](#) for the selected course. Follow this process for each course requiring sections.

☐ Automatically Add New Sections - Optimize Sections

Optimize the Number of Sections is the fastest way to create a schedule within the Builder.

1. Review the **Optimize** checkbox on the right for accuracy.
 - a. If the Optimize checkbox **is selected** and the **Optimize the Number of Sections** button is selected, the course will be affected. See below for more information.
 - b. If the Optimize checkbox **is NOT selected** and the **Optimize the Number of Sections** button is pressed, the course will be unaffected.
 - c. If **building from scratch**, this might be the ideal way to build sections based on the entered requests.

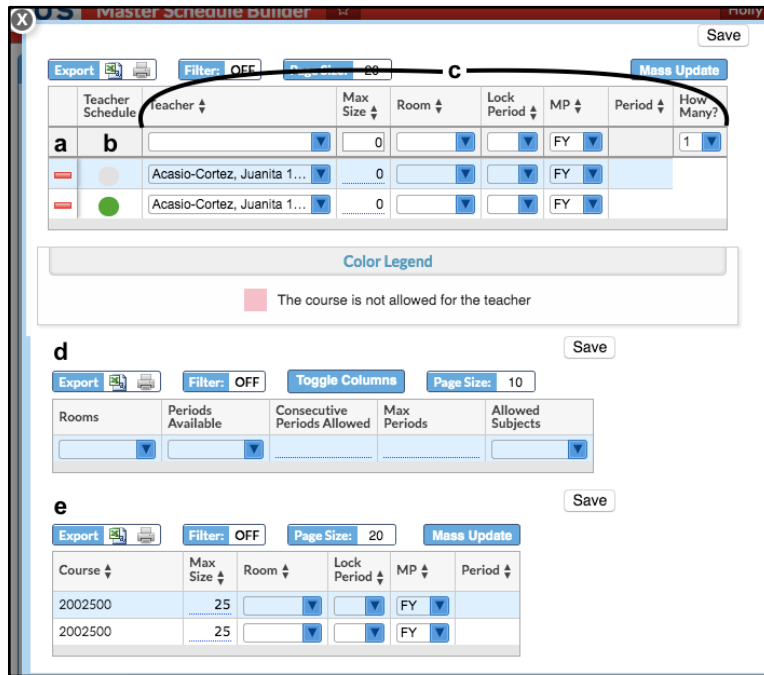


2. Click **Optimize the Number of Sections** at the top of the screen.
3. Any section with the Optimize checkbox selected will have:
 - a. Extra sections created for courses marked with red in the **Current Sections** column.
 - b. Sections remove marked with yellow in the **Current Sections** column.

- c. Sections without a teacher assigned will be created without a teacher. Teachers can be adjusted on the **Sections** tab or **Assign Teacher** tab before or after running the Builder.

Edit or Delete Existing Sections

Existing sections (including newly created sections) can be edited and deleted from the **Courses** tab.



The screenshot shows the Master Schedule Builder interface. At the top, there's a 'Teacher Schedule' tab selected. Below it, a table lists sections with columns: Teacher, Max Size, Room, Lock Period, MP, Period, and How Many. A red dash icon is next to the first row. Below the table is a 'Color Legend' section. The interface also includes sections for 'Course Defaults' and a table for 'Course Defaults' with columns: Course, Max Size, Room, Lock Period, MP, and Period. The interface is labeled with letters a through e corresponding to the instructions.

- a. **Delete** - Click the **red dash** to delete the section. Click **OK** in the confirmation box.
- b. **Teacher Schedule** - display the teacher's currently assigned courses. See option E below for more details.
- c. These columns are explained in the previous section, **Add New Sections**.
- d. This section displays the **Course Defaults** set within the Builder (**Setup tab > Course Defaults** sub-tab). This can be adjusted here. This section only displays when **Teacher Schedule** is selected.
- e. This section displays how many sections the teacher is currently assigned. This section only displays when **Teacher Schedule** is selected.
- f. Click **Save** before exiting this screen.

Step 4: Section

The **Section List** is a simplified version of the **Master Schedule Report**. The **Section** list contains all current sections and this is where clean-up is done BEFORE each run of the Builder.

	Teacher	Subject	Course	Sections	Requests	MP	Followup	Rooms	Max Size
						FY			
Copy	Williamson, Tayneica L : ...	Math	1200700 Math Coll. Rea...	2		FY		02 2307	25
Copy	Williamson, Tayneica L : ...	Math	1200700 Math Coll. Rea...	2		FY		02 2307	25
Copy	Williamson, Tayneica L : ...	Math	1207300 LIB ARTS MAT...	1		FY		02 2307	25
Copy	Walker, Diana L : 3151	Social Studies Electives	2106026 M/J CIVICS AD...	3		FY		04 4205	0
Copy	Walker, Diana L : 3151	Access M/J courses	7863090 LRNG STR: 6-8	3		FY		04 4205	25
Copy	Walker, Diana L : 3151	Social Studies Electives	2106026 M/J CIVICS AD...	3		FY		04 4205	0
Copy	Walker, Diana L : 3151	Social Studies Electives	2106016 M/J CIVICS & ...	5	107	FY		04 4205	25
Copy	Walker, Diana L : 3151	Social Studies Electives	2106026 M/J CIVICS AD...	3		FY		04 4205	0

1. Add a section using the top blank row by filling in the appropriate fields.
 - Click **Enter** on the key board.
 - Click **Save**.
2. **Delete** - Select the **red minus** sign.
3. **Copy** - Select **Copy** to make a duplicate of the section.
4. **Field options**:
 - a. **Teacher** - Displays the current teacher for the course.
 - b. **Subject** - Displays the subject area the teacher is assigned.
 - c. **Course** - Displays the course the teacher is assigned.
 - d. **Sections** - Includes all imported or newly created sections for the course, not for the teacher.
 - e. **Requests** - Counts are for the course, not the teacher.
 - f. **MP** - Sets the course marking period term.
 - Each section should have a term designation: Full Year, S1, etc.
 - EOC courses should be Full Year unless block scheduled.
 - g. **Follow-up courses** - This is the same as **Linked Sections**. try to assign the same periods to

courses in different marking periods (e.g. Government followed-up by Economics).
This can also be done using **Create Packages** to link course sections **after** completion of running the **Builder**.

- h. **Rooms** displays the room assigned to a section.
- i. **Max Size** is the maximum number of students that can be scheduled into the section; this can be modified here.
- j. **Periods Spanned** is used for courses that are longer than one period.
- k. **Rotation Days** only appears if **Rotation Days** are enabled in **System Preferences** for the school, along with period and calendar set-ups.
 - The **number** of rotation days the sections will meet **MUST** be indicated in the checkbox. If this is left blank, the sections won't schedule.
 - Use **Mass Update** to fill in Rotation Days or must select each one.
 - If a specific value is selected individually, that section will only schedule on that day.
- l. **Lock Periods** is used to lock a section into a specific period. If **Import From Master Schedule - With Periods** was used, **ALL Periods** will show as Locked.
- m. **Scheduled Period** is blank until a Builder run is completed. Afterward, this will be the period the builder has assigned to a section.
- n. **Scheduling Issues** are blank until a run is completed. If there are errors with scheduling a section, this column hints to the cause of the issue.
 - Not requested found an unassigned period
 - No sections have been assigned to this period: 07
 - The best choice 03
 - No student requesting this course has yet been assigned to this period: 01

Step 5: Assign Teachers

The **Assign Teachers** tab displays the teachers and which sections they are assigned.

- If a section (from the **Sections** tab) is missing a teacher, the section will be highlighted in yellow with a suggested teacher name.

Number	Course	Suggested	Assigned
1001010E	M/J LANG ARTS 1		Dimitritov, Taylor 25969
1001020	M/J LANG ARTS 1 ADV		Sokolosky, Randi 3789
1001020	M/J LANG ARTS 1 ADV		Sokolosky, Randi 3789
1001040	M/J LANG ARTS 2		Migut, Shannon 3825
1001040	M/J LANG ARTS 2		Migut, Shannon 3825
1001040	M/J LANG ARTS 2		Migut, Shannon 3825
1001040	M/J LANG ARTS 2	Migut Shannon: 3825	
1001040	M/J LANG ARTS 2	Migut Shannon: 3825	

Option 1 - Individually Assign Teachers

1. Click the **Assign Teachers** tab.
2. Review the **Assigned** teachers.
3. Select the teacher from the drop-down or click the **Suggested** teacher.
4. Click **Save** before proceeding to the next page.

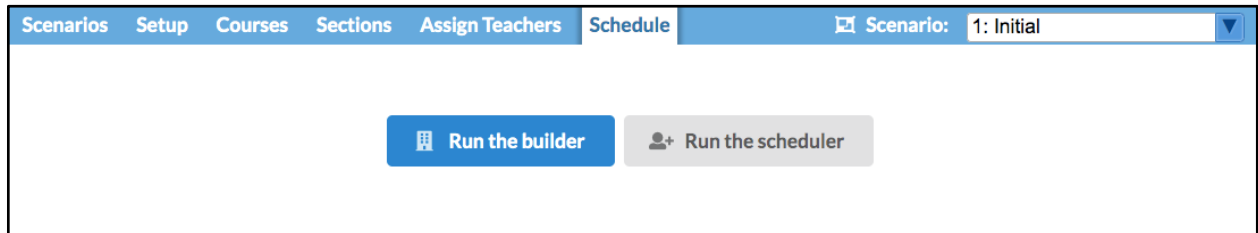
Option 2 - Assign Suggestions (Mass Assign Suggested Teachers)

1. Click the **Assign Teachers** tab.
2. Review the **Assigned** teachers.
3. Click **Assign Suggestions**. This will apply to ALL pages. This will auto-save.

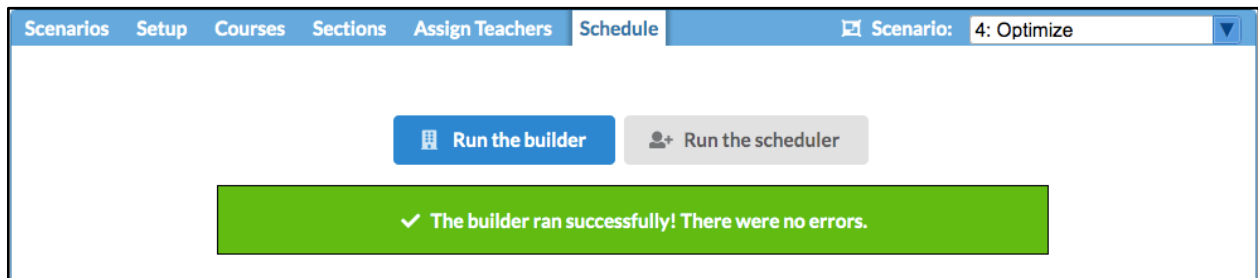
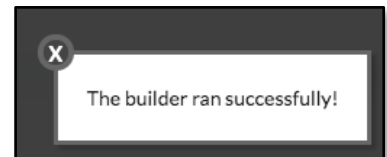
Step 6: Run the Builder

Following the previous configuration steps, the system is now ready to build the Master Schedule. Within the **Schedule** tab, the **Builder** and **Scheduler** can be run.

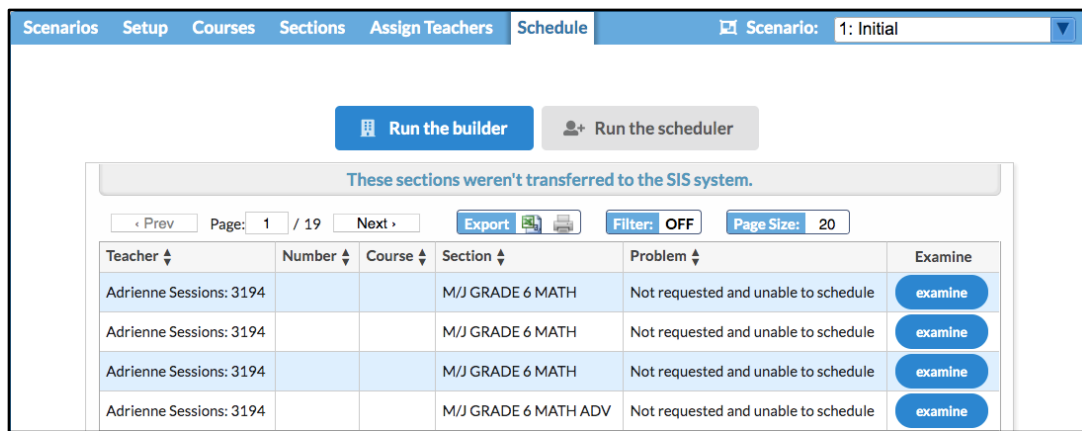
1. Click the **Schedule** tab.



2. Click **Run the builder**.
3. This confirmation will appear if there **were no errors**.
 - A pop-up will display. Click the X to exit.
 - A confirmation message appears.



4. This confirmation will appear if there **were errors**.
 - Click **Examine** to give more information about the section.



- Click the **Sections** tab to view the periods assigned to each section and any scheduling issues the builder encountered.
- The last 2 columns (**Scheduled Period** and **Scheduling Issues**) will now populate because the Builder has been run.

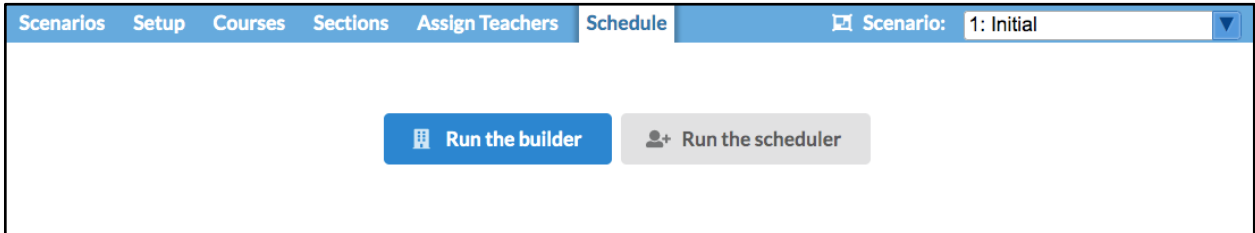
Scheduled Period ▲▼	Scheduling Issues ▲▼
02	The best choice 02
01	The best choice 01
07	No sections have been assigned to this period: 07
	Not requested found an unassigned period
	Not requested found an unassigned period
	Not requested found an unassigned period

- Any errors can be cleaned up on the **Courses** tab or **Section** tab. It is ok to **view** the **Teacher Schedules Report**, but don't make any adjustments to it if the Builder is still being used.
- Click **Run the builder** after making adjustments.
- Repeat all the steps in this document as many times as necessary until satisfied with the percentage from the Builder.

Step 7: Run the Scheduler

Once satisfied with the builder selection of periods and all or most issues have been fixed, the students are ready to be scheduled.

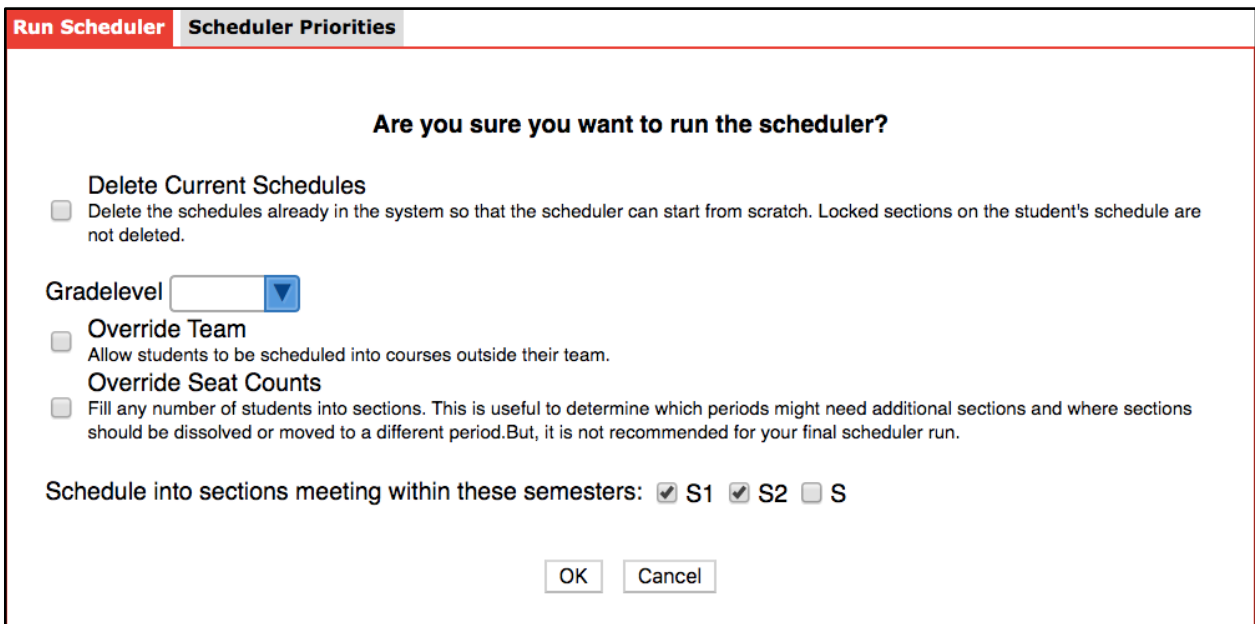
1. Click the **Schedule** tab.



The screenshot shows the Master Schedule Builder interface with the 'Schedule' tab selected. The 'Run the scheduler' button is highlighted in blue, while the 'Run the builder' button is greyed out. The 'Scenario' dropdown is set to '1: Initial'.

2. Click **Run the Scheduler**.

Another tab will display showing the options for running the scheduler.



The screenshot shows the 'Run Scheduler' dialog box with the 'Scheduler Priorities' tab selected. The dialog asks 'Are you sure you want to run the scheduler?' and provides several options:

- Delete Current Schedules**: ☐ Delete the schedules already in the system so that the scheduler can start from scratch. Locked sections on the student's schedule are not deleted.
- Gradelevel**: (dropdown menu)
- Override Team**: ☐ Allow students to be scheduled into courses outside their team.
- Override Seat Counts**: ☐ Fill any number of students into sections. This is useful to determine which periods might need additional sections and where sections should be dissolved or moved to a different period. But, it is not recommended for your final scheduler run.
- Schedule into sections meeting within these semesters**: ☒ S1 ☒ S2 ☐ S

Buttons: OK, Cancel

3. Select the appropriate options.

10. Delete Current Schedules - This option will delete any existing schedules. Check before each subsequent run.

11. Grade Level - This allows scheduling one grade level at a time.

12. Override Team - If the school uses teaming for scheduling, this option will allow students to be scheduled into courses outside the team.

13. Override Seat Counts - This option will disregard seat counts on sections, displaying which periods might need additional sections, where sections should be dissolved or moved to a different period (**NOT RECOMMENDED FOR THE FINAL RUN OF THE SCHEDULER**).

14. Schedule into sections meeting within these semesters - Choose one or both semesters to be scheduled.

4. Click **OK** once all selections have been made.

A confirmation box displays at the top of the screen. This is the same confirmation that would be seen if using **Run the Scheduler** from the **Scheduling** menu instead of the Builder.

✔ Finished in 0 minutes 24 seconds.
 80.65% of 589 students with all requests filled.
 100% of students with full schedules.
 95.29% of 2418 requests filled.

Courses with Unfilled Requests
All Unfilled Requests

2 Courses with Unfilled Requests
Search

- **Green check with time** is how long the run took.
- The **first %** is based on the number of students that had requests filled
- The **second %** is based on how many of the total students were fully scheduled.
- The **last %** is based on the total number of requests. This is the **Percent Scheduled** that will display on the **Scenario** tab in the builder.

5. Click the **Scenarios** tab and view the **Percent Scheduled** for that run.

Scenarios
Setup Courses Sections Assign Teachers Schedule
Scenario: 1: Initial

Save

Export
Filter: OFF
Page Size: 15
Mass Update

Scenario	Title	Requests Scheduled	Fully Scheduled	Last Run Date	Duplicate
2	Rotation Day Trial				Duplicate
1	Initial	95.29%	100.00%	02/13/2020	Duplicate

Step 8: Scenario Options

After running the Initial scenario, there are options to duplicate or create a new scenario to experiment with other scenarios.

❑ Create a New Scenario

A brand-new scenario will need to be set up from the beginning.

1. Click the **Scenarios** tab.
2. Enter a **Title** for the new scenario In the top blank row.
3. Click **Enter** on the keyboard. The row will turn yellow.
4. Click **Save**.

❑ Duplicate a Scenario

An existing scenario can be copied to adjust and run to see if the percent scheduled improves.

1. Click the **Scenarios** tab.
2. Find the Scenario to duplicate.
3. Click Duplicate.

The duplicated scenario will appear in the list with a title of “Copy of ____”.

4. Rename the Scenario.
5. Click **Save**.

Scenarios						Scenario: 5: Copy of Rotation Day ...
						Save
Export  Filter: OFF Page Size: 15						Mass Update
Scenario	Title	Requests Scheduled	Fully Scheduled	Last Run Date	Duplicate	
5	Copy of Rotation Day Trial				 Duplicate	
4	Optimize			02/14/2020	 Duplicate	
2	Rotation Day Trial				 Duplicate	
1	Initial	95.29%	100.00%	02/13/2020	 Duplicate	

Step 9: Done with the builder



Alert: When done using the Builder and ready to move to the next phase of scheduling, further changes **should not** be made in the **Master Builder**, but from **Courses and Sections**, the **Teacher Schedules Report** or the **Master Schedule Report** in the **Scheduling** menu.

At this point, Schedulers have the option to continue to use the Builder and Scheduler to try to increase the percentage of scheduled students or tweak the new Master Schedule outside of the Builder. **If the decision is made to tweak outside the Builder, DO NOT RETURN to the MASTER SCHEDULE BUILDER. The student schedules would be created by using the Run Scheduler option in the Scheduling Menu.**



Tip: Please refer to the **Tweaking the Master Schedule** training documentation to continue with the scheduling process if the decision is made to discontinue using the Builder.