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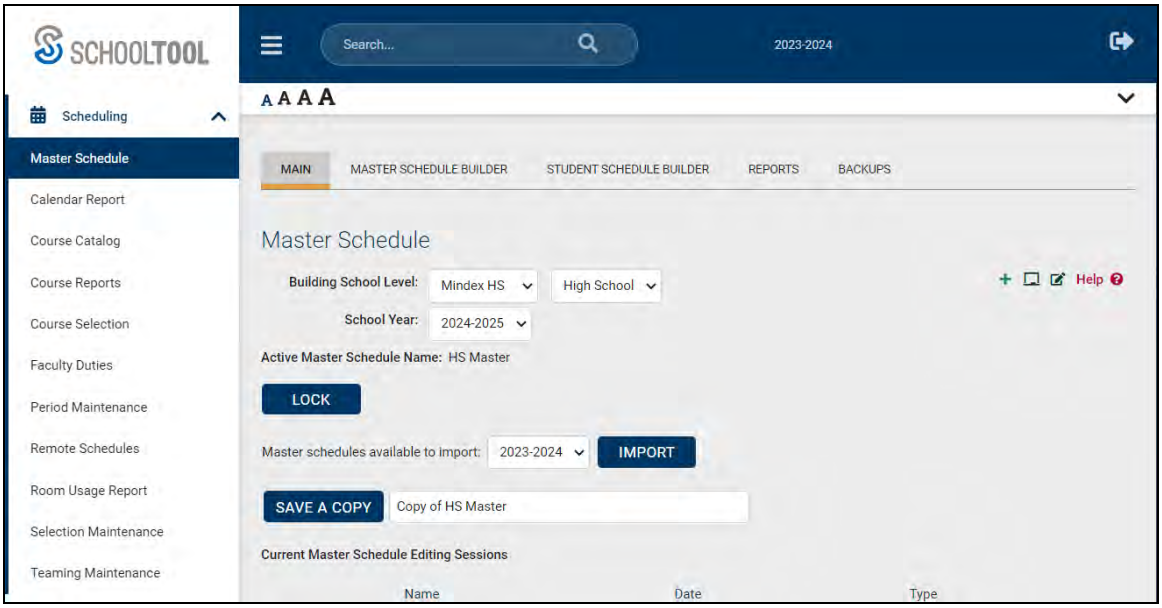
Scheduling Module

User Guide

Version 23.2



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Scheduling Module Overview

The Scheduling module within SchoolTool is where school schedulers go to work with and build student, building, and teacher schedules. All school-level schedules may be

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built here manually from the ground up, or by rolling over components of a previous year's schedule, or by utilizing SchoolTool's built-in constraints and automated scheduling tools. Before you begin the process, refer to Appendix C for an overview of the scheduling process.

Scheduling Sub-modules

Master Schedule - The Master Schedule sub-module controls a building's entire Master Schedule using information from the course catalog and from student course requests to build and track sections of courses, teachers and rooms.

Course Catalog – The Course Catalog contains all of the information about a building level's courses, such as course name and number, the department they fall under, and a variety of other details. The Yearly Details of a course also include grading scale options, GPA inclusion flags, and information about assessments tied to this course.

The Course Catalog sub-module also allows users to safely rollover course catalog information from any year to any other year.

Calendar Report, Course Reports, Room Usage Report – All three of these sub-modules allow us to create valuable reports used for maintenance and tracking of our courses, calendar, and room assignments.

Course Selection – The Course Selections sub-module is used for making an individual student's course requests for upcoming years. These requests can be entered in a number of ways, and are utilized by the schedule and student builder tools for automated course scheduling.

Faculty Duties - This sub-module allows districts to define various teacher assignments that may be viewed on a faculty schedule as well as on the Master Schedule Whiteboard and Teachers' My Home screens. Once a duty has been created, it can then be assigned to one or more teachers from within the Master Schedule Whiteboard.

Period Maintenance – The Period Maintenance sub-module is responsible for tracking the period structure for a given building and year. This information can be imported from a previous year.

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Selection Maintenance – In Selection Maintenance, users can enter course selections for larger groups of students, allowing them to mass-request specific courses for many students at the same time. This area also allows users to manage course recommendations submitted by teachers and convert those recommendations into official course selections.

Teaming Maintenance – Teaming Maintenance is most utilized by middle and elementary schools to group students together in teams, allowing for block scheduling (middle schools) and tracking (elementary schools).

Scheduling > Student Record Basics

When you Select > a student from a list, you will see that student's Personal Information Record, also known simply as the Student Record.

Most SchoolTool users deal with student records most often, but every individual in SchoolTool has his/her own Person Record where all information related to that person is stored. This document will focus on working with a Student Information Record, as these typically contain the most detail.

The Student Record contains all information about a student. There are 2 main parts to the Student Record: the Personal Information section and the Student Information section. When using certain modules, additional sections may appear at the bottom of the record with module-specific information. This information is available based on user permissions and the module you are using; therefore not all users will have access to every tab in the Student Information section(s).

Use the Show/Hide buttons ↓↑ to collapse sections of the student's record that you do not wish to see. This will result in less scrolling needed to view the student's record.

If you are viewing the results of a student search, you can use the following options:

1. Click the Next and Previous buttons →← to move forward and backward between students in your search results.
2. Click the Cancel Search ⊘ button to cancel the current search and remain on the current student.
3. Click the ← Back button to return to the previous screen.

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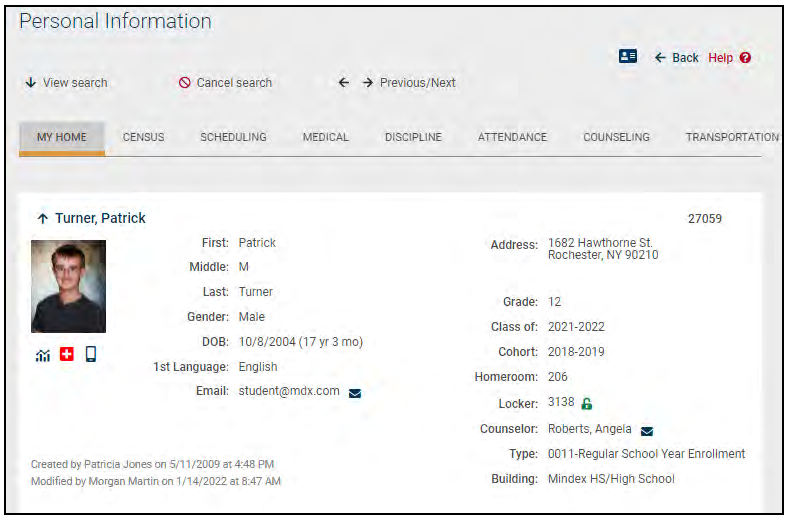
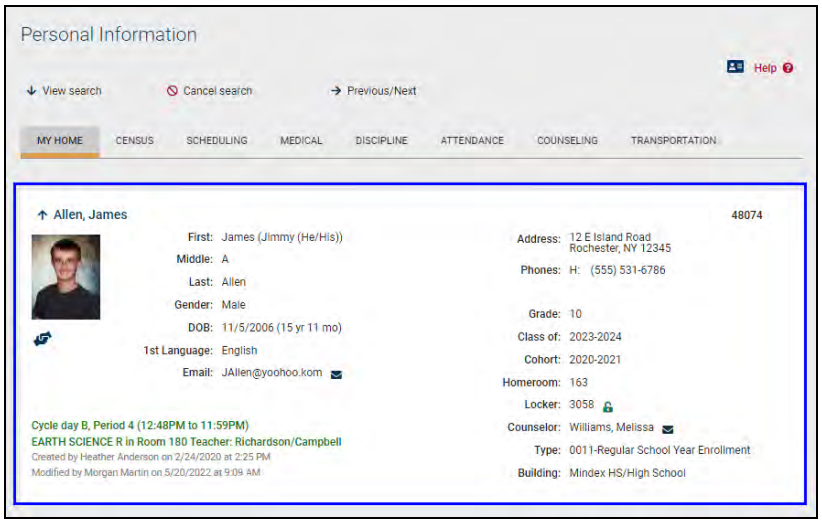


Personal Information Section

The Personal Information section at the top of the student record contains a summary of the student's information. This information includes the student's name, gender, age, primary language, and contact information. It also shows the student's grade, homeroom, homeroom teacher (with an email link), locker number (with an icon 🔓 that shows the locker combination in a mouse-over), counselor (with an email link), enrollment type, building/school level, and home district (if applicable). The student locator text in the bottom left corner of this section shows the current location of that student, based on the student's schedule and attendance data. If the student has any alerts, those icons will display for users with the appropriate permissions.



Note: The specific information available here is based on Maintenance settings; not all users will see all fields/data.

There are several types of alerts that may be visible on a teacher's class roster and also on individual students' Personal Information Records. In addition, the alert icons may provide more information on the specific alert, which displays in a text box that appears when the user holds the mouse over an alert icon.

Available alerts include the following icons and corresponding mouse-over text:

AIS Program Service Icon:	**IEP Viewer** Icon:	**Medical Alerts** Icon:	**Custom Alerts** Icon:	**Send Notification** Icon:
Mouse-over text: AIS Info: Service: Math	Mouse-over Text: IEP Direct Viewer Needs:	Mouse-over text: Medical Alert Allergy: Peanuts headaches; Carries Ep stitches:	**Note:** Custom Alerts are indicated by a flag or other image and may be any color defined by the district. The mouse-over text will display the name of the custom alert as defined in Maintenance.	Clicking this icon opens a pop-up where users can enter a message to send to this student via direct notification in the SchoolTool mobile app
Student RTI Information Icon:	**View Shared District Data** Icon:	**Student Dashboard Viewer** Icon:	**WebEdge Student Portfolio Viewer** Icon:	**MTSS Summary Report Viewer** Icon:
Hovering the mouse over this icon will display a list of that student's	Clicking this icon opens a window to display student	Clicking this icon opens a window to display the Student View	Clicking this icon opens a window to display the WebEdge Student	Clicking this icon opens a window to display the MTSS Summary Report

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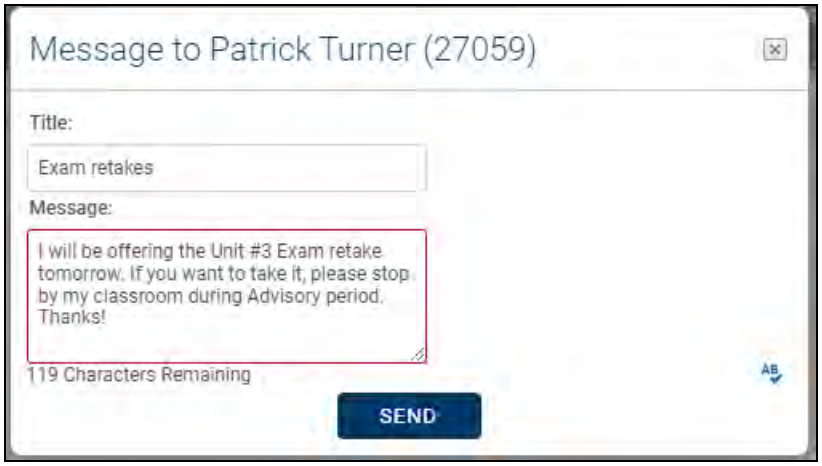
active RTI records.	data shared by another district. This icon appears only when districts have configured data sharing.	dashboard for that student.	Portfolio for that student.	for that student.

The visibility of these alerts is controlled by district permission settings. Users may be able to see the alert icon only, the mouse-over text description only, both, or none of these, depending on their user permissions. Separate permissions also control whether users may see these icons on a teacher's Roster.

The Send Notification button appears for students who have opted to receive direct notifications in the SchoolTool mobile app (this also requires that the district has configured that building school level to allow direct notifications). Click the Send Notification button and enter a title and message to send to the student, then click Send. The message will be delivered as a notification on the student's mobile device.



Users with permission to view students' SchoolTool Premier dashboards may see a SchoolTool Dashboard Viewer icon for students who have a Student ID and have ever had an in-district enrollment. If this icon appears, users can click on the Viewer icon to view that student's dashboard in a new window.

If shared data is available from another SchoolTool district, a View District Data icon may appear on in the alerts area. This will allow the user to view data from another

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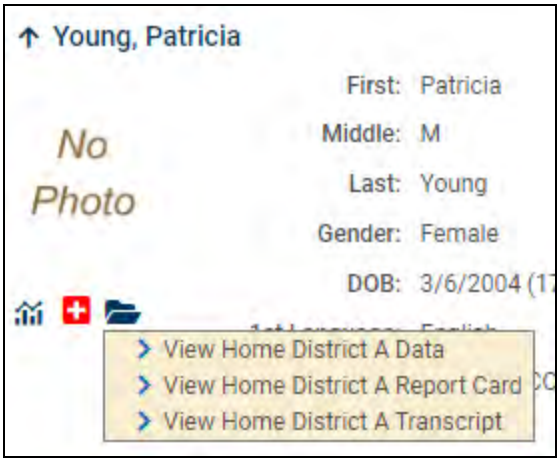
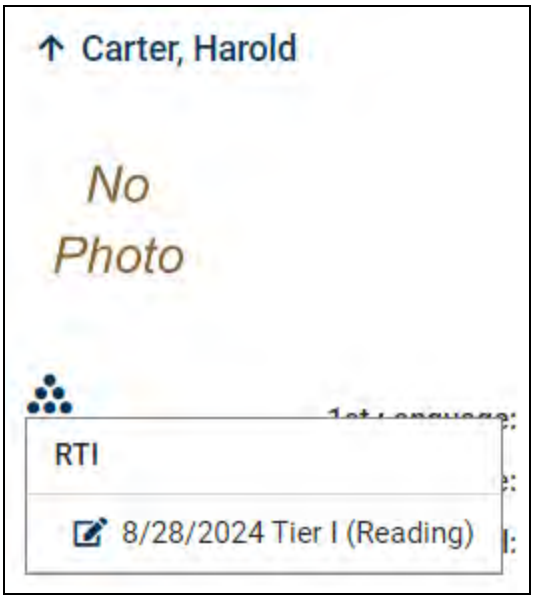
district that has been configured for district-to-district data sharing (most likely between a BOCES and home district). To view shared data (or shared report cards and/or transcripts), hover over the District Data icon and Select the desired option (View District Data, View District Report Card, or View District Transcript) from the dropdown.



Users with the Mouseover Information permission can hover over the RTI icon to see a list of the student's active RTI records.

If the user has View or Edit rights, corresponding buttons will be available for each record (either an Edit icon, for users with Edit permissions, or a Select icon, for users with View permissions).



or

Viewing RTI Records

Users with View rights only will see Select icons for each record in the list.

Select a record to view details in read-only mode. Click the Back button to return to the student record. Click the RTI Detail Report icon to print the RTI record and its associated intervention details.

Editing RTI Records

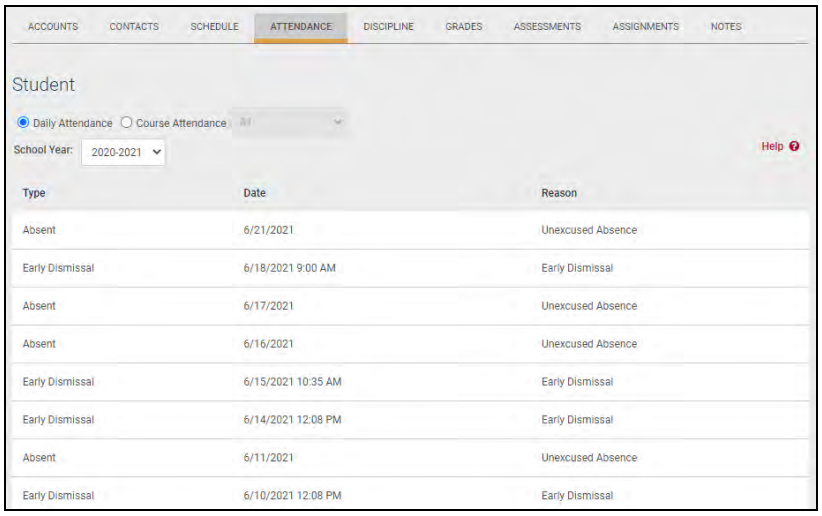
Users with Edit rights can click the Edit button for any of the RTI records listed.

Click the Edit icon for any record to open it in edit mode. Make changes as needed and click Save to return to the student record. Please note that any number of interventions may be edited or added, but the top section of the RTI record cannot be changed from this screen. Click the RTI Detail Report icon to print the RTI record and its associated intervention details.

Attendance Tab

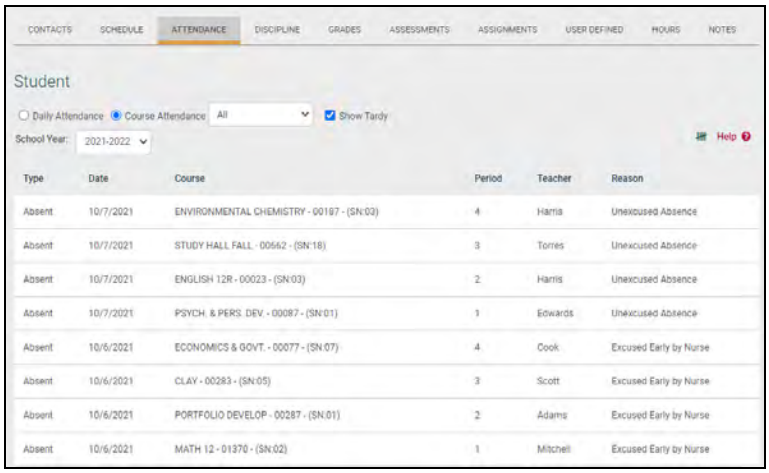
The Attendance tab shows a summary of the student's total absences for the current year (if any). Users may change between Daily or Course attendance views by selecting the appropriate radio button. Use the year drop-down to review historical data for a previous year. If the student has courses in more than one building school level, additional drop-downs may be available to filter based on location.

The Daily Attendance option shows users all daily absences. This may also include early dismissals, late arrivals, and in/out records.

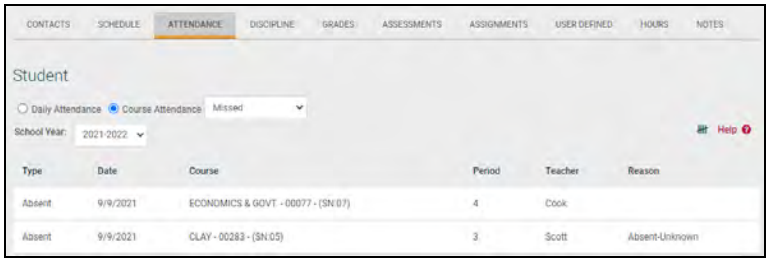


The Course Attendance options (All, Missed Courses, and Attendance Letter) allow users to see a summary of course attendance for that year.

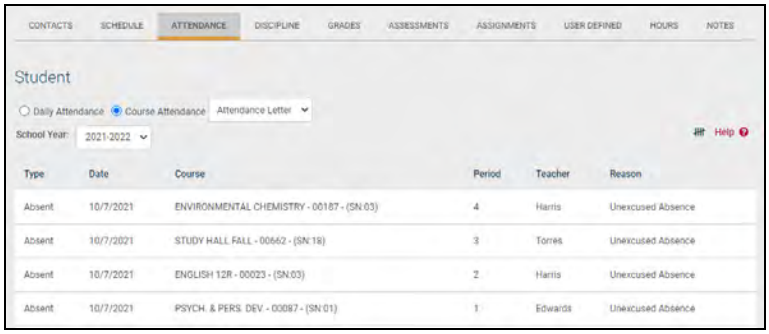
- All: shows users all course absences, including those that are tied to daily absences. Users with the appropriate permissions can choose to show or hide period tardies using the Show Tardy checkbox.



- Missed Classes: shows users all period misses where the student was marked absent by a teacher (this view only includes period misses for times when the student was expected to be in class, and does not include period absences that are tied to daily absences).

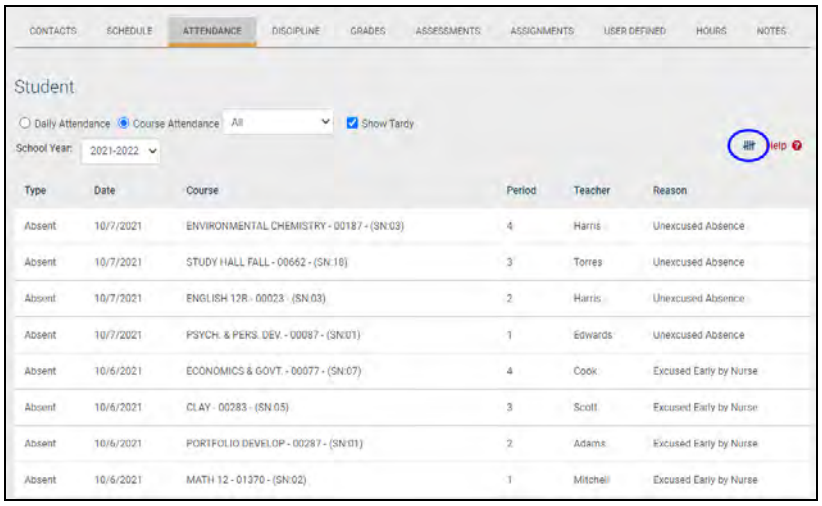


- Attendance Letter: shows users a list of period attendance that may contribute to attendance policy letters (the specific types of attendance entries shown is dependent on how course attendance policy is configured).

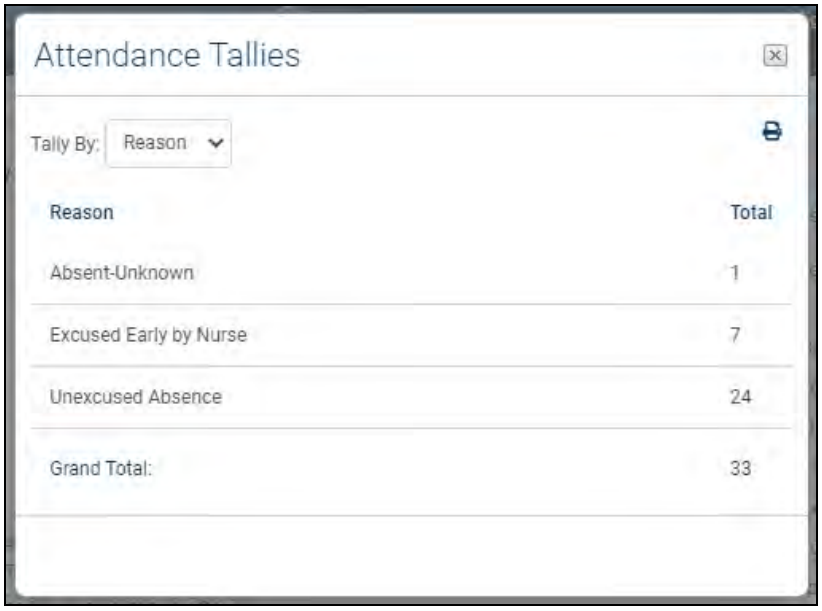


Each view is controlled by its own permission; if you do not have permission to view a specific option, the radio button for that option will not appear. In addition, depending on your school's settings, newly submitted absences may not be visible immediately.

To view tallies, click on the Show Attendance Tallies button in the upper right corner of the Course Attendance view.



A list of attendance tallies will display in a pop-up. Use the drop-down to tally by reason, type, course, period, teacher, or date. Click the Print icon to send a printer-friendly version of the tallies to your printer.



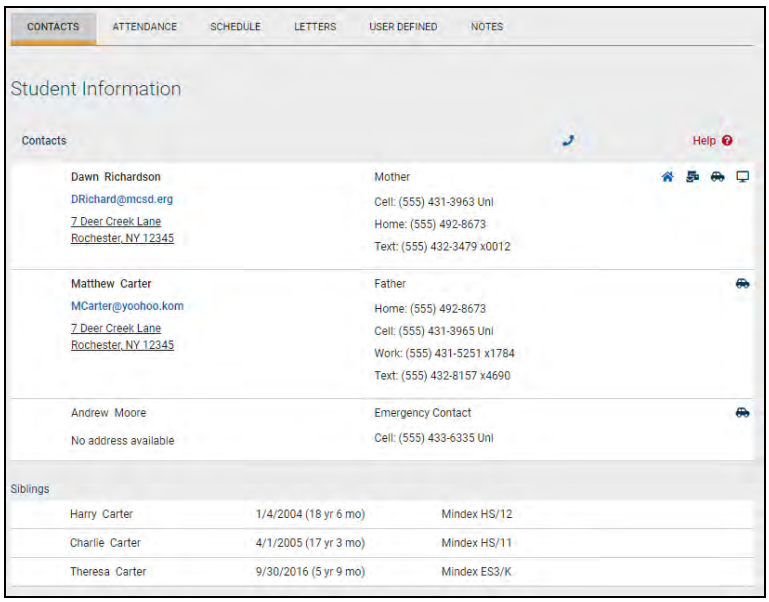
Contacts Tab

The **Contacts** tab gives users immediate access to this student's parents/guardians. Each contact associated with this student will appear on this tab.

To view the Contact Call Order for a student, click the View Call Order button at the top of the Contacts tab.

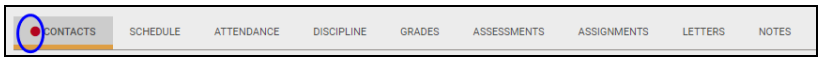
Additional buttons appear to the right of each contact, giving you more information about this contact and their rights/responsibilities. To see more information about the contact, hold the mouse over each button and tool tips will appear giving more details:

- The Primary icon lets you know this contact is the primary guardian.
- The Receives Mail icon lets you know this contact will receive report cards, discipline letters, and other mailings about this student.
- The Pickup icon lets you know this contact is legally allowed to pick the student up at school.
- The email icon lets you know this guardian may be contacted by email. Users may be able to click the icon to send an email to that person.
- The Custody Alert icon lets you know that there is a custodial situation regarding the student.
- The Parent Portal icon lets you know that this contact is allowed to see that student in their Home > My Home > Students tab (Parent Portal). Users with the appropriate permissions may be able to view that contact's login history (the maximum number of logins shown here is based on district settings).
- The Restricted View icon indicates that the person has restricted access to contact information for that student. The adult is unable to see contact information for anyone who does not live in his/her household.



The information on this tab is view-only. If changes need to be made, this information should be shared with anyone who maintains student and contact information.

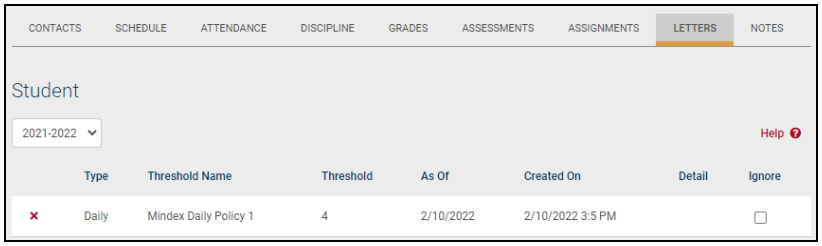
If there is a custody alert associated with that student, the Contacts tab will show a red circle.



Letters Tab

On the Letters tab of a Student Record, users will see the student's Attendance Letter history. The list is read-only unless the user has permission to delete letters or mark them as ignored, and may be sorted by any column. Users may view other years' Attendance Letters by using the drop-down menu.

Users with the appropriate permission may delete any letter from the Letters tab. If this permission is enabled, a Delete ✖ button will appear next to each letter in the list.



The Attendance Letters history shows the following information:

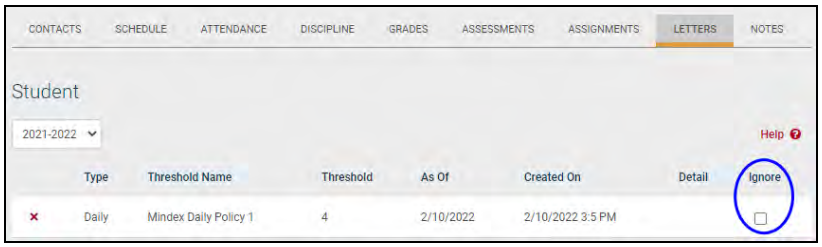
- Type: Displays the policy type that was used for that letter (this is determined based on the Attendance Policy settings in Maintenance). The values shown here may be Daily, Course, or Tardy, depending on the type of policy.
- Threshold Name: The name of the Attendance Policy stage that was used to generate this letter.
- Threshold: Shows the number of misses used for that particular Attendance Policy threshold.
- As Of: Reflects the date entered by the user when running the Attendance Letters search
- Created On: Displays the date on which the user actually generated that letter
- Detail: Provides details about the course for which the letter was run. The details, which are separated by commas, are Course ID, Course Name, and Section Number (SN), respectively.
- Ignore: When checked, a letter will be marked as “ignored” and SchoolTool will behave as though the letter was never sent. When a letter is ignored, the comment entered by the user as the reason for ignoring the letter will be displayed in a second row.

Details will only display when the policy Type is Course; if the Type is Daily or Tardy, the Details field will be blank.

Users with the appropriate permissions may mark a student's attendance letter as “ignored.” When a letter is marked as “ignored,” SchoolTool will keep the historical record to indicate that the letter was sent. However, when determining which students

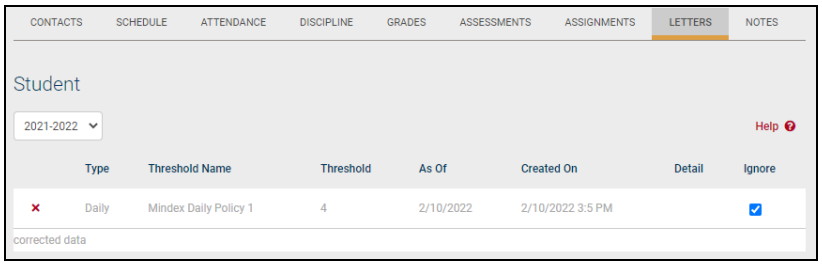
need attendance letters, SchoolTool will behave as though that particular letter was never sent.

To ignore an attendance letter, click the Ignore checkbox on the right side of the screen for the letter you wish to ignore.



In the pop-up window that appears, enter a brief comment to indicate a reason for ignoring the letter and click OK to continue.

When a letter is marked as “ignored,” the letter will display on the student's Letters tab in gray text. To remove the “ignore” status, simply uncheck the Ignore checkbox (this will also remove the comment).



User Defined Tab

The User Defined tab is available on the Person Record for students, residents, or faculty. This tab displays any active user defined screens created in Maintenance. These screens are created and configured by the district and may contain any number

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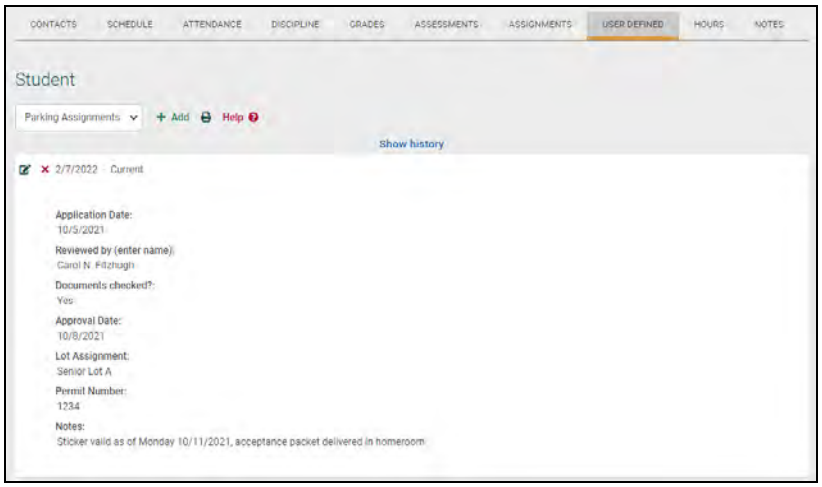
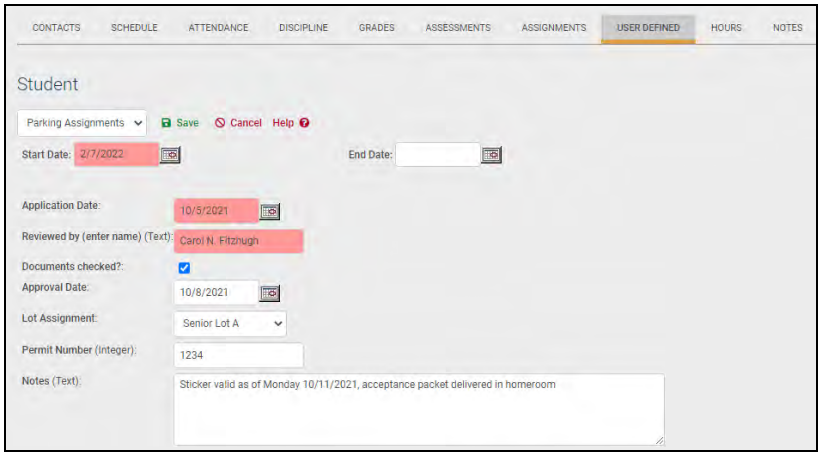
of custom fields and field types. Select a user defined screen from the drop-down menu to view a list of all active records for that screen.

If the individual has data entered for any user defined screen, this information will appear in read-only mode on this tab. Click Show History to show all records for that screen, including inactive records. Users can also click the Print button to generate a report of that person's user defined screens.



Users with Edit permission may add, modify, or remove records. To modify an existing record, click the Edit button and modify as needed. Click the Delete button to permanently remove a record.

To add a new record, select the screen from the drop-down menu and click the Add button. A new record will open in edit mode. All required fields are highlighted in pink.



Enter information in each field as appropriate and Save the record when finished. Field types are indicated for all fields except drop-downs, and may include any of the following field types:

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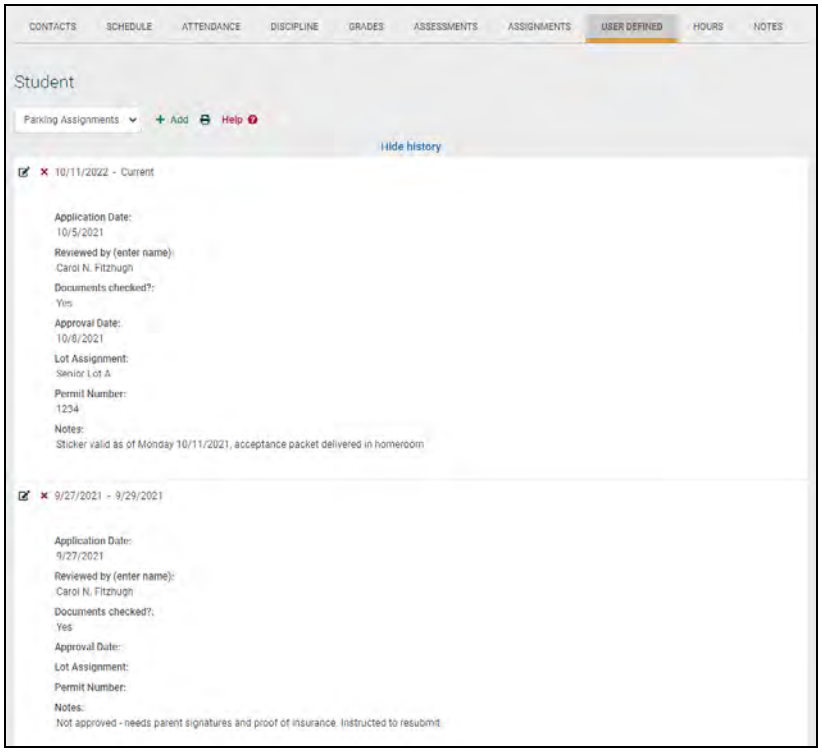
- Drop-down List
- Text
- Real (real numbers; can include decimal points)
- Integer (whole numbers only)
- Date
- Checkbox (Yes/No)

Active fields, field types, drop-down content, and maximum field lengths are specified in Maintenance for each user defined screen. Refer to the Maintenance Module documentation for detailed information on configuring a user defined screen.

All records must have a Start Date, which is used to indicate the date the record became active. If an End Date is entered, that indicates the date that record expires. Once the End Date has passed, the record will become inactive and will be visible when a user clicks “Show History.”



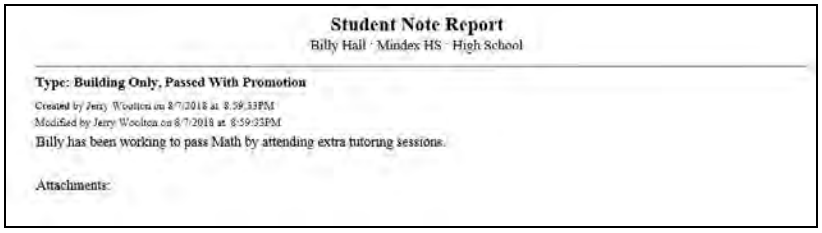
Notes Tab

Each person record contains a **Notes** tab where you can add other information about this person. For a student, you might add notes about club participation or record meetings with parents. This is also where Orders of Protection are added. Be careful about the confidentiality of the information you add, as some notes can be seen by all users.

Printing Student Notes

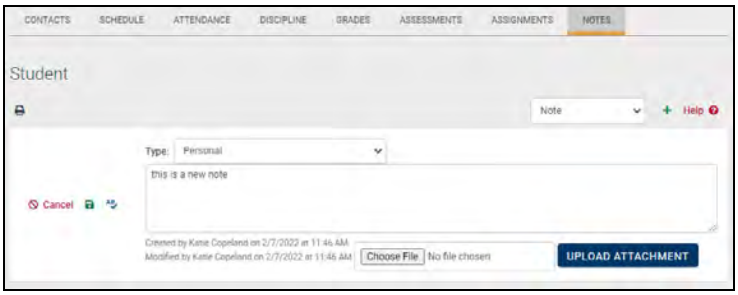
Users may print a report of all Student Notes listed on the Notes tab by clicking the Print icon in the upper left corner of the Notes area. The report will include all notes that are visible to that user, and will display the note type, the dates the note was created and/or modified, the note text, and will indicate whether or not the note has any attachments.

If the user has permission to view Orders of Protection, the report will also include these notes. The report will include all Effective dates and Expiration dates indicated on the Order of Protection note.



General Notes

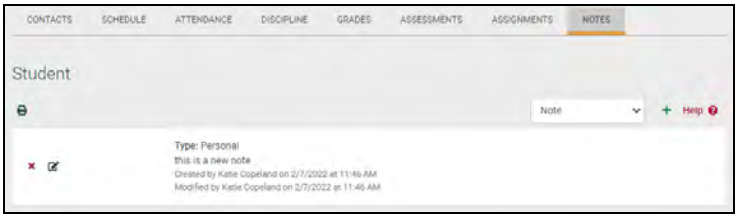
1. Click once on the green Add Note button.
2. Select a Note type. There are four (4) types of General Notes:
    A. Global – which, when saved, are available to all SchoolTool users.
    B. Building Only, Not Passed with Promotion – which become a part of the student's record only until he/she advances to the next building. Notes are only visible for the student's most recent official enrollment location.
    C. Building Only, Passed with Promotion – which, when saved, become a part of the student's record and remain as he/she advances to the next building.
    D. Personal – which are only available to the user that entered the note.
3. Enter the note content in the free-text area. This field will accept up to 1,000 characters.



4. Add any supporting documents by clicking once on the Browse button and locating a file on the hard drive. Files may be any format (Word documents, spreadsheets, HTML, emails, etc), and there is no limit to the number of

attachments which may be included. Once a file is located, it must be uploaded to SchoolTool in order for it to be saved with this note.

5. Once the Note is saved, the tab will refresh showing the notes in read-only mode.



6. The Notes tab title will display a green circle to indicate that “new” notes exist on that student's record. Notes are considered new for a specified number of days after they have been created or modified, as defined by the district.

   The Notes tab title will display a red circle when an active Order of Protection note exists, regardless of whether or not new notes exist.

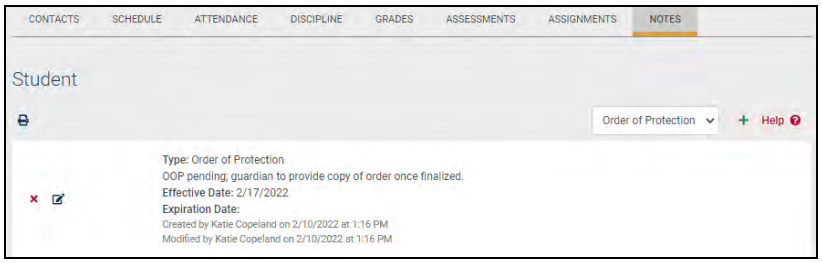
7. Use the Delete ✖ and Edit buttons to remove or make changes to existing notes.

Orders of Protection

1. Select Order of Protection from the drop-down list at the right of the tab.
2. Click once on the green Add Note ✚ button. An Order of Protection record will appear.

3. Complete the Order of Protection:
   A. Type a free-text description (required) of the order in the box under the word Type.
   B. Enter an Effective Date (required). Type the date manually in the mm/dd/yyyy format, or use the pop-up calendar.
   C. Enter an Expiration Date (if any). Type the date manually in the mm/dd/yyyy format, or use the pop-up calendar.
   D. Attach any digital supporting documents by using the Browse and Upload Attachment buttons.

4. Click once on the green Save button to the left of the description comments box.



Once the Order of Protection has been saved, the Notes tab will display a red circle, alerting users that there is an Order of Protection for this student.

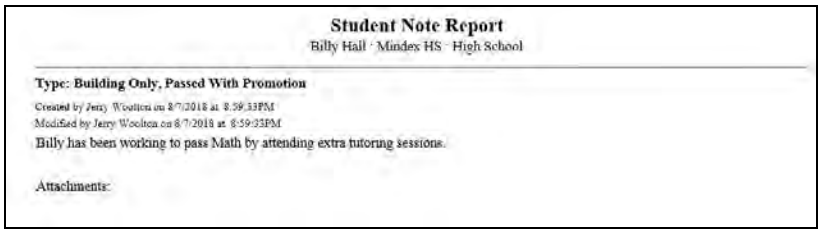
Orders of Protection can be Edited and Deleted as necessary.

The Created By and Modified By audit tracking will update as users add and update this information.

Printing Student Notes

Users may print a report of all Student Notes listed on the Notes tab by clicking the Print icon in the upper left corner of the Notes area. The report will include all notes that are visible to that user, and will display the note type, the dates the note was created and/or modified, the note text, and will indicate whether or not the note has any attachments.

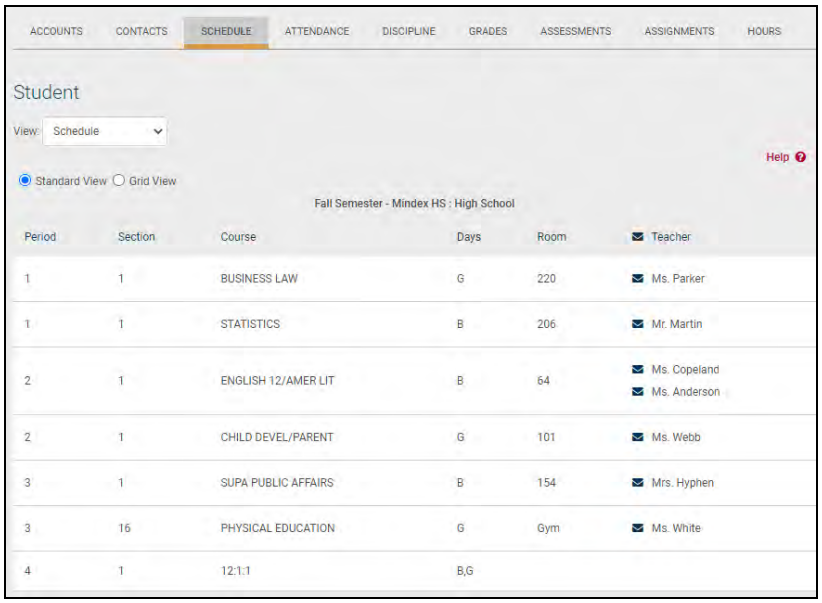
If the user has permission to view Orders of Protection, the report will also include these notes. The report will include all Effective dates and Expiration dates indicated on the Order of Protection note.



Schedule Tab

The Schedule tab shows the student's schedule for each marking period or semester in read-only mode. This tab is typically empty for elementary students, because general education classes and "specials" (art, music) are typically set up as supplemental courses (courses not tied to specific periods).

Note: Depending on user permissions and settings in Maintenance, student schedules may not be available until after a specified date. When this is the case, a message will appear in place of the schedule to indicate that schedules are not currently available.



Click the Print icon to print the student's schedule. If multiple report formats are available, you will be provided with a drop-down menu where you may select the appropriate report format to be generated.

When viewing the Schedule tab, users typically have two (2) view options: Standard View and Grid View. These are presented as radio buttons; select the appropriate option to toggle the view between Standard and Grid views.

Standard View

Standard View displays the student's schedule as a read-only list of courses, ordered by period number, along with section number, course name, days the class meets, the room number, and the teacher are listed for each course. Supplemental courses are listed at the top of each list.

When viewing the schedule in Standard View, any unscheduled periods are omitted.

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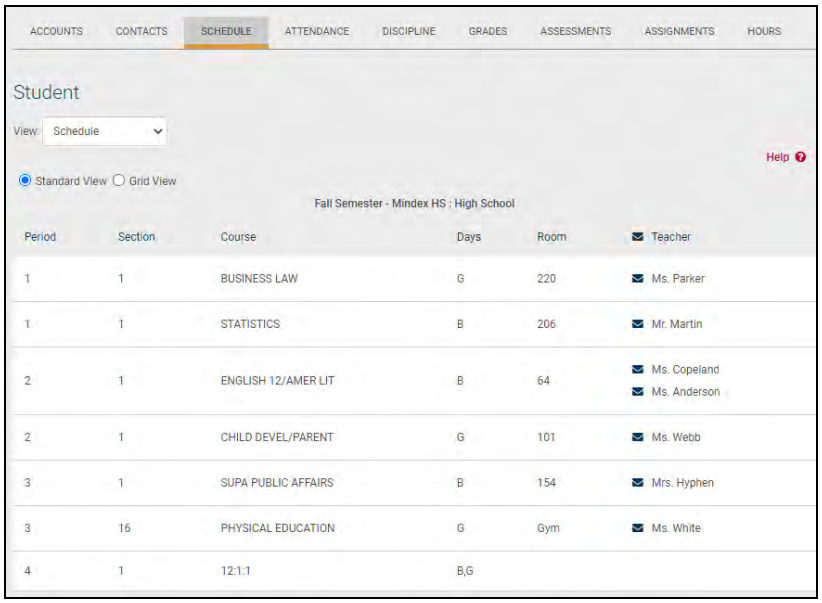
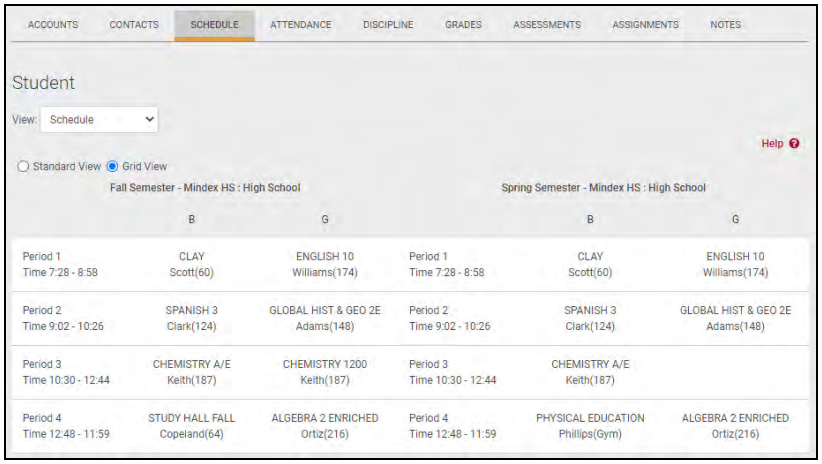


Grid View

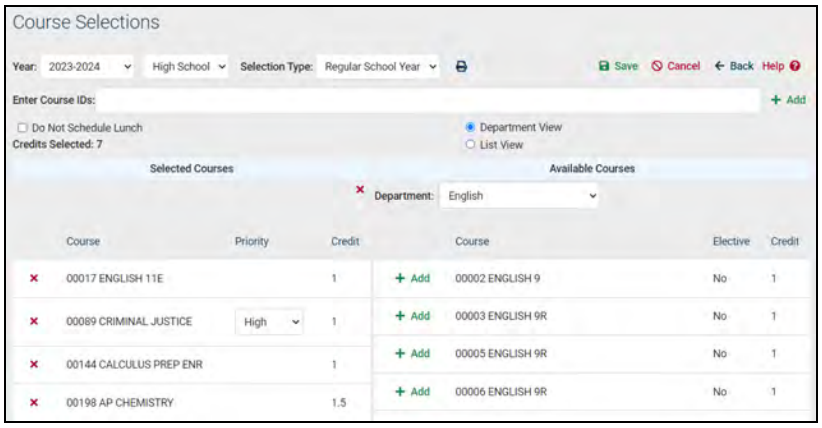
Grid View displays the student's schedule in a read-only grid format. This provides a visual representation of the student's schedule for each period across each cycle day. Supplemental courses are shown at the bottom of each grid.

When viewing the schedule in Grid View, any unscheduled periods are omitted.



Course Selections

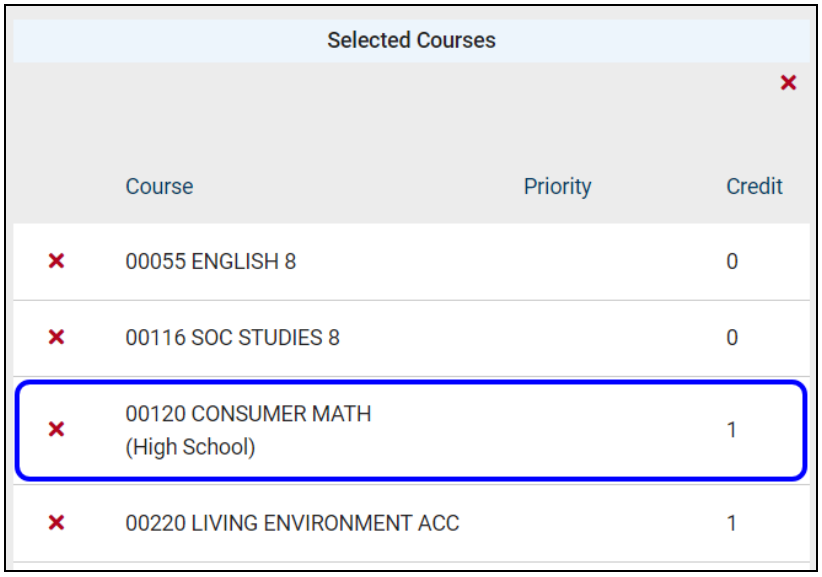
The Course Selections area is located at the bottom of the student record. This area is used to review and enter course selections (requests) for an individual student’s upcoming year’s schedule.



The School Level drop-down will include any schools for which the student has an official enrollment, an alternate enrollment, or any existing course selections for that school year.

Course selections can be associated with either the Regular School Year or Summer School by using the Selection Type drop-down. This is primarily used when running scheduling tools, such as the Student Schedule Builder. It can also be used for purely informational purposes. In general, it is recommended to leave this set to Regular School Year unless you have been directed otherwise.

Selections for courses in schools other than the one currently selected in the drop-down will be indicated in parentheses.



Please refer to the detailed instructions provided in the **Scheduling > Course Selection** section for additional information on how to use the Course Selections area.

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Scheduling > Master Schedule

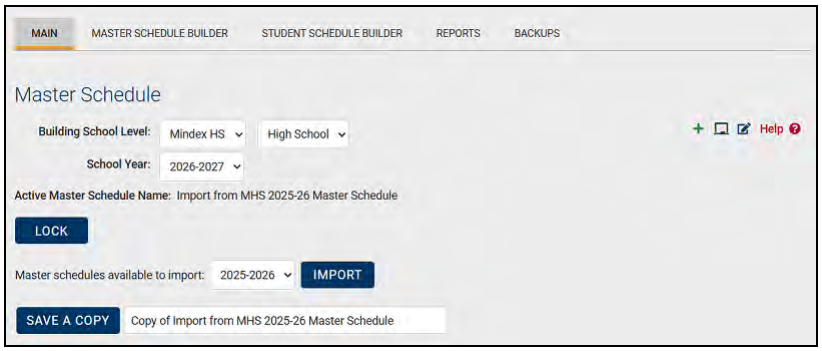
Each school in your district has its own Master Schedule. This is where these Master Schedules are built and maintained; allowing sections to be added to courses at any time during the year.

Users can create their Master Schedule several different ways within this sub-module:

- They can rollover the previous year's schedule, making any necessary edits manually;
- They can create a new blank schedule by hand and add all section information; or
- They can use SchoolTool's Master Schedule Builder which uses course constraints and rules to build the schedule, or a part of the schedule.

This sub-module also provides the tools for automatically loading your Master Schedule with students (Student Schedule Builder) based on their requests. In addition, there are numerous reports to help analyze student requests, course sections, and student schedules.

If you have not set a default building and school year (in **Home > Preferences**), you will need to select the desired building/school level when you enter the Master Schedule sub-module.



Notice this sub-module is divided into several tabs. Not all tabs will be visible for all users, depending on user permissions and the status of the selected master schedule.

- Main: This tab provides access to the Master Schedule editing tools, including the Master Schedule Editor and Master Schedule Whiteboard. This tab always appears.
- Master Schedule Builder: This is where we configure course, faculty and room constraints which allow SchoolTool to automatically create the best-fit schedule using course catalog and student course request information. This tab appears until the Master Schedule is locked, and then it is hidden.

- Student Schedule Builder: This is where we load students into the Master Schedule, thus building student schedules. This tab does not appear until a Master Schedule exists. Users can then access it until a final lock is performed, at which time it becomes hidden.
- Reports: Contains many reports for schedule verification and analysis. This tab always appears.
- Backups: Here we can backup and restore our current Master Schedule. This tab appears until the Master Schedule is locked, and then it is hidden.

Master Schedule Editor / Main Tab

The tab labeled **Main** is the default tab when first entering the Master Schedule submodule. It is here that you can create new master schedules, backup your existing master schedule, and work with individual course sections: adding, removing, and modifying them.

Refer to the appropriate procedures described in the sections listed below for detailed information on how to perform the various master schedule editing actions. Be sure to read all information and all notes or reminders carefully, as changes in this area can have a major impact on the master schedule!

From the **Scheduling > Master Schedule > Main** tab , users may have various options, depending on whether or not the Master Schedule is locked for the selected year:

- Create a new master schedule + (only when selected master schedule is unlocked or when one does not yet exist)
- Edit the current master schedule using the Master Schedule Editor (unlocked schedules only)
- Edit the current master schedule using the Master Schedule Whiteboard (unlocked schedules only)
- Lock the current master schedule
- Import/restore an existing master schedule
- Save a copy the current master schedule as a backup

Current Master Schedule Editing Sessions

In addition to the editing options, the Main tab includes a Current Master Schedule Editing Sessions section which lists all users who are currently editing the master schedule, along with the time their sessions started and the editor type they are working with (Editor or Whiteboard).

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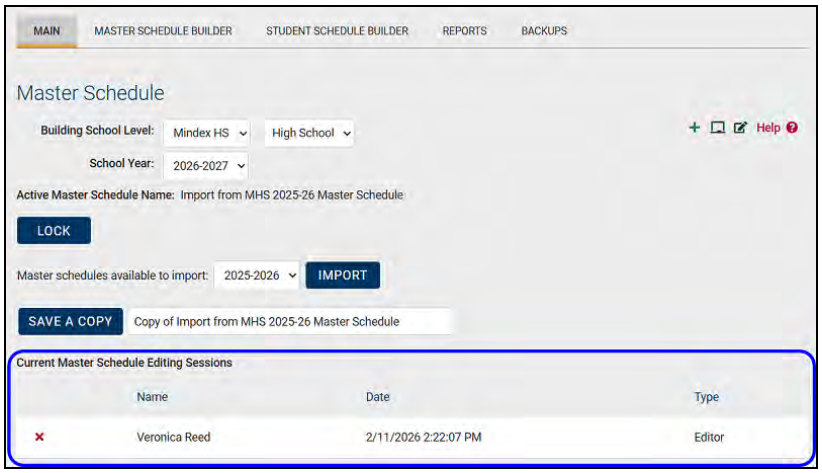
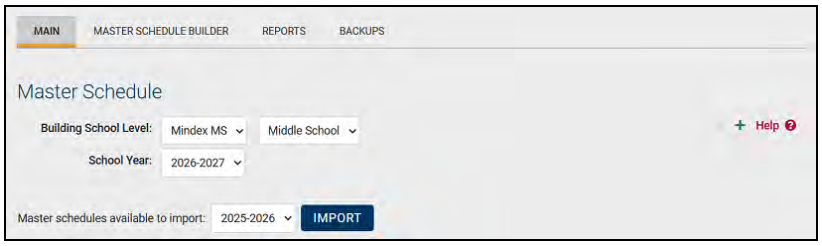


While multiple users may edit the master schedule simultaneously using the Master Schedule Editor (provided they are working in different departments), the Whiteboard allows only one (1) user at a time to edit the master schedule. If any user has an active editing session using the Whiteboard, any other users who attempt to use the Master Schedule Editor or the Whiteboard will be unable to save changes. Similarly, if one or more users have active sessions in the Master Schedule Editor, users attempting to use the Whiteboard will be unable to save changes. In either situation, users will receive a message that other sessions are currently active and that they will be unable to save. Users may still use these editing tools for viewing purposes, but save options will be disabled.

Note: A limited number of users may have permission to unlock editing sessions from the Main tab. These users will see an Unlock Session ✖ button next to each active session. Because unlocking editing sessions can have far-reaching impact, this is not common. For more information on this permission, please refer to the Maintenance module documentation.

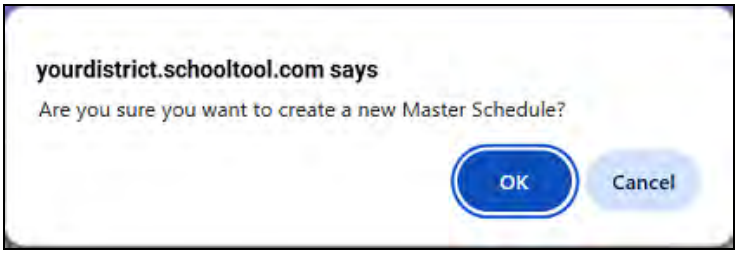
Creating a New Master Schedule

A new Master Schedule can be created at any time, if the Master Schedule has not been locked. Remember, however, that a new Master Schedule will overwrite the existing Master Schedule. Refer to the section on Making a Backup to make sure you have a copy before performing the following steps.



Creating a new master schedule from scratch requires only that you name and save it:

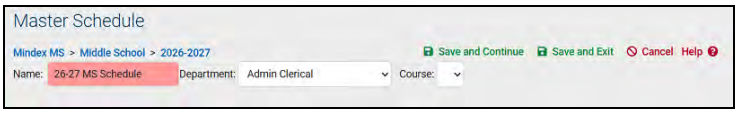
1. Click on the Create New Master Schedule ➕button.
2. Verify that you want to create a new Master Schedule by selecting the OK button.



3. Type the name of your new master schedule in the pink box.

   Tip: Include the school year and school building in the name of your master schedule.

4. Click either Save button before starting to add course sections.



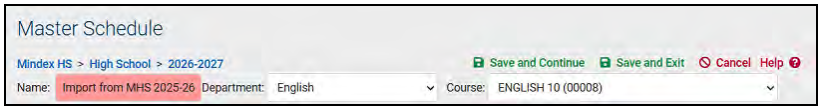
   Note: If you already have a master schedule, clicking the Create New Master Schedule button will automatically backup the existing master schedule, and open a brand new "empty" master schedule.

Master Schedule Editor

The Master Schedule Editor allows you to add, modify, and/or remove individual sections of courses and assign faculty to these sections so that students can be scheduled. Common tasks might include any of the following:

- Adding and removing multiple sections to/from courses.
- Adding and removing faculty to/from courses.
- Modifying the timeframes that sections are being offered (semester, day, period…).
- Changing rooms or maximum headcounts for course sections.

To begin, locate the specific course you wish to work with by using the drop-downs at the top of the screen.



!Important Notes about Working in the Master Schedule

Depending on the size of your school, one or more users may be working in the master schedule at the same time. SchoolTool allows multiple users to add or edit course sections as long as they are not working in the same Department at the same time.

- For example, one guidance counselor could be adding sections of Phys Ed, while a principal could be editing AIS sections. As long as each user is working in a different Department, each user will be allowed to save their work. However, if more than one user attempts to edit sections for courses in the same department, a SchoolTool concurrency server error may result.
- An exception to this, however, occurs when users are working in the Master Schedule *Whiteboard*. When someone has an active Master Schedule Whiteboard session, users will be unable to save any changes in the Master Schedule Editor until the other user has exited their Whiteboard session (or an administrator has terminated their session, if appropriate).

Saving Changes in the Master Schedule Editor

To save any changes you have made to courses and sections in the Master Schedule Editor, click on one of the two Save buttons toward the top-right of the Master Schedule Editor screen:

- Save and Continue (on the left side): This button will save your work and refresh your screen (there may be a slight delay). All of your changes to the entire Master Schedule will be saved, and you will remain in the Master Schedule Editor.
- Save and Exit (on the right side): This button will save your work and exit you from the Master Schedule Editor. All of your changes to the entire Master Schedule Editor will be saved, and you will return to the Main tab.

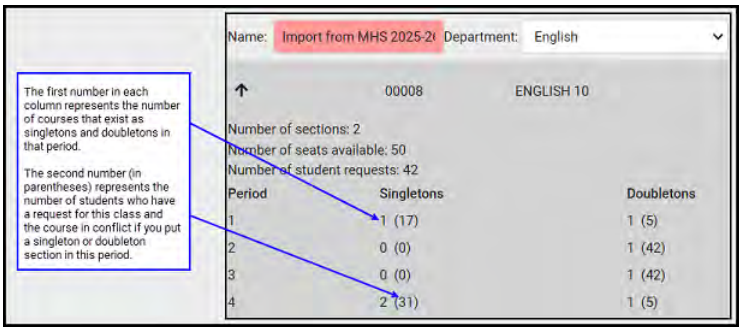
Using the Show/Hide More Info Button / Mini-Conflict Matrix

When viewing a section of a course, you may click on the Show/Hide (More Info) button to see more details about this course. Additionally, a 'Check for

one or more warnings' red flag 🚩 icon will appear whenever there are too few seats in the current section to satisfy all student requests.

When expanded, this area will display the following:

- Number of existing sections for this course
- Number of seats available among these course sections
- Number of students having this as a course selection
- Mini conflict matrix if this course is a singleton or doubleton



This **mini conflict matrix** is designed to show how many other singleton and doubleton courses are in the same periods as this one, along with how many students have requests for both. In our example above, there are 7 other singletons and 16 other doubletons in Period 7, but no students have singleton or doubleton conflicts. This would indicate to the user that Period 7 is the best choice for sections for this course.

Adding Sections

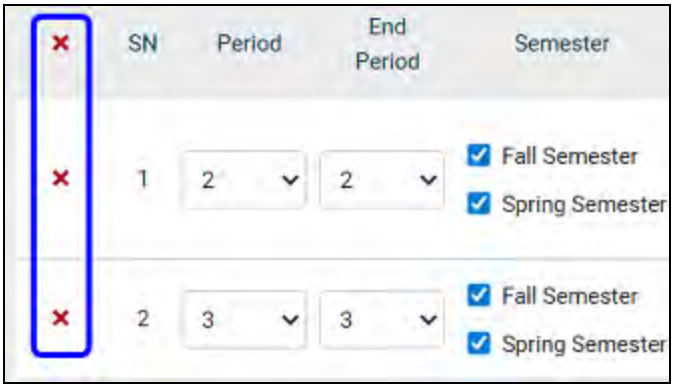
To add a section to a course, click the Add button in the upper right. You can also add multiple sections in a single operation by using the "Sections" dropdown next to the Add button to choose how many sections you'd like to add.

In the rows that you just added to the grid, specify the details for each section (see below for a description of each available field). After adding and/or editing

sections, remember to Save your work. Once students have been scheduled into a section, it will become "grayed out" and can no longer be modified.

Deleting Sections

To delete a section, click the Delete button in the row you wish to remove. Use the Delete All button in the top/header row of the grid to remove all sections of that course (this will remove any sections that do not currently contain scheduled students; sections tied to students cannot be deleted).



Notes about Deleting Course Sections:

- You may not delete a section that has students tied to it, whether the students were manually scheduled or scheduled through the Student Schedule Builder. This is true for official, alternate, or projected enrollments, and applies to active, projected, and pending schedules
- You will receive a warning if the section has data (other than scheduled students) tied to it. Continuing with the Delete operation will permanently remove the section and any associated data will be removed.

Course Section Details

The following must be defined for each course section:

- **SN (Section Number)**: As sections are added, new numbers are automatically assigned by SchoolTool. Depending on your district, it may be possible to modify section numbers to identify specific sections in other areas of SchoolTool.
- **Period**: Indicates when the section is scheduled to start during the day. Set this to "NONE" to make it a supplemental, meaning simply that it is not tied to a specific time of day.

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Notes about Supplementals

- Supplemental sections can be graded and can have attendance taken
- Supplementals do appear on student schedules and marking period report cards
- Supplementals add flexibility to student schedules by allowing additional courses that cannot fit into the regular periods of the day to be added to a student's schedule

- **End Period**: Indicates when the section will end during the day. This will default to the same period as that selected in the Period drop-down. Courses can begin and end in the same period, or may end several periods after beginning (such as Vo-Tech or Block courses).
- **Semester**: Refers to the semester(s) in which this section meets. Sections may, for instance, be scheduled for only a single semester or run through the entire year (all semesters). If all semesters are checked, then this course is a full-year course. If you need to create a half year course that meets in both semester 1 and semester 2, then you would create two new sections, one for each semester.
- **Cycle**: Shows the cycle days that this section is scheduled to meet. A two-cycle day school may have a course that meets every day (A and B) or every other day (just A). If there is an “A day” variant of this course as well as a “B day” variant, then two separate sections should be created.
- **Max**: This is the maximum number of students allowed in this section. This field is a free-text, numeric field and is used to validate the room assignment. Use the Mass Entry button If no value (the field has been left blank) has been entered for this field, the user will be prompted to enter a value that can be used.to copy the value that has been entered in the first section's Max column to all sections of the listed course.

Notes about Max Headcount

- If the max headcount is set to zero (0), no students will be allowed into this section when running the schedule building tool (i.e Student Schedule Builder), and this section will not appear as an option in the drop-down when editing student schedules.
- The district-defined threshold may be utilized to allow a certain number of students in a section above and beyond the listed max headcount. If seat counts are enforced, and there is no threshold, then this number cannot be overridden. A scheduler may choose not to enforce seat counts when running the schedule building tool.

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    - The section cannot be saved or navigated away from if the room chosen cannot fit the Max. A warning message will also appear at the top of the screen, though you may need to scroll up to see it.

- **Needs Max:** This is the maximum number of special-needs students that may be scheduled for each section of a course. This value will default to the same value as the Max field, though it can be changed for each section as needed . You may also use the Mass Entry button to apply the same value to all sections of that course.

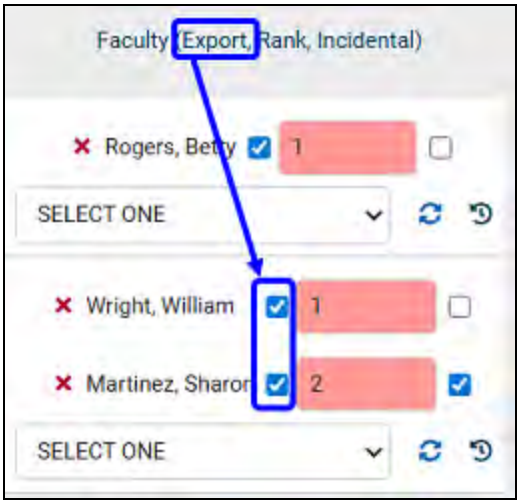
  Notes about Needs Max

  > ***Note:*** Needs are determined by the existence of a program service record which has been designated as a "Need" in District Maintenance. Examples of "Needs" may include IEPs, 504s, Disability records, AIS records, etc.
  >
  > The Student Schedule Builder will respect this field and will never exceed this value.
  >
  > ***Note:*** This does not apply to the Counseling module, as manually scheduling a student will allow counselors to override this value.

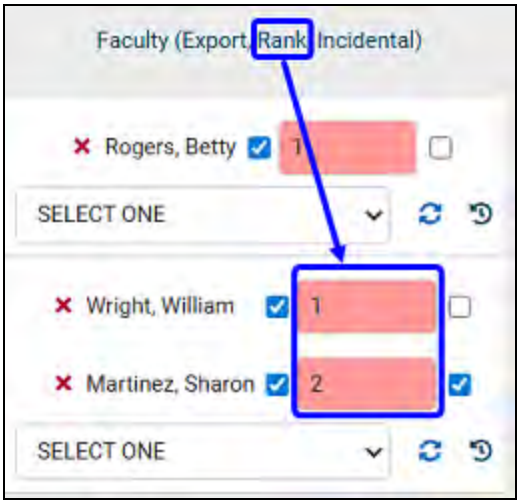
- **Room**: Indicates where this class is to meet. The section cannot be saved if the room chosen cannot fit the Max Headcount (room thresholds are set in Maintenance).
- **Export Options**: Indicates whether the class is delivered face to face, or is an online, distance or blended learning course. Also indicates the primary language of instruction. This defaults to English.
- **Graded**: This should be checked if students taking this section are to receive a grade. Sections of courses such as science labs, study halls, and lunches are typically not graded. If this box is left unchecked, teachers will be unable to submit grades for students.
- **Teams**: This can be used if this section is designated for a specific team of students (or team group) only. If teams are not defined for this school level, this column will not be displayed.
- **Faculty** (Export, Rank, Incidental): This column displays all teacher(s) assigned to teach this section who are currently listed as active faculty in the Faculty module, as well as any export options for each faculty-course assignment

  Faculty Export Options

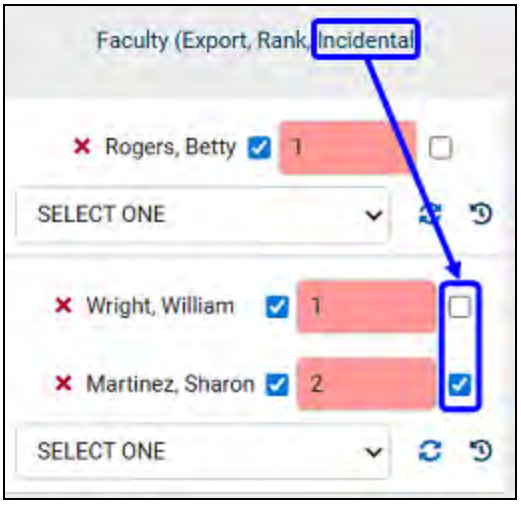
- **Export**: The checkbox on the left is used to specify whether a specific teacher should be included in exports for that course section.



- **Rank**: If multiple teachers are assigned to the section, a rank field will appear to allow users to assign ranks to each faculty. When removing a faculty from a section, keep in mind that rank values do not auto-number, so these values may need to be adjusted manually when making changes here.



- **Incidental**: The checkbox on the right is used to specify whether or not that faculty-course assignment should be exported as an Incidental Teaching Assignment.



Adding Faculty to a Section

Faculty may be added to multiple sections before saving. Simply select a faculty for each section, then click either of the Save buttons.

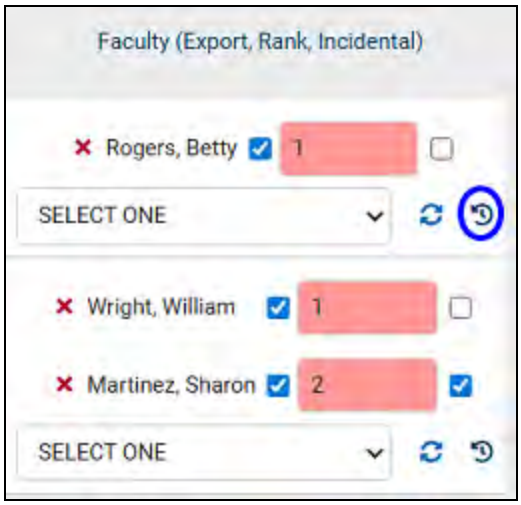
To add multiple faculty members a single section of any course, select the first faculty member from the drop-down list. Click any of the Update buttons on the screen, wait for the screen to refresh, and then select another faculty member. Be sure to Save your work when faculty assignments are complete.

If more than one faculty member is assigned to a section, a rank field will appear next to each teacher's name. This rank is used to determine the "primary" teacher for whom the course will be displayed on the Master Schedule, including on the Master Schedule Whiteboard. As additional teachers are added to a section, the rank field will be pre-populated with the next logical rank number based on any already existing ranks.

To delete faculty members from a section, click on the red Delete button next to their name. Keep in mind that the Rank field does not automatically renumber after a faculty member is removed, so deleting the Rank 1 teacher will not cause the Rank 2 teacher to automatically become the "primary" instructor. You may need to update these values manually when making changes here.

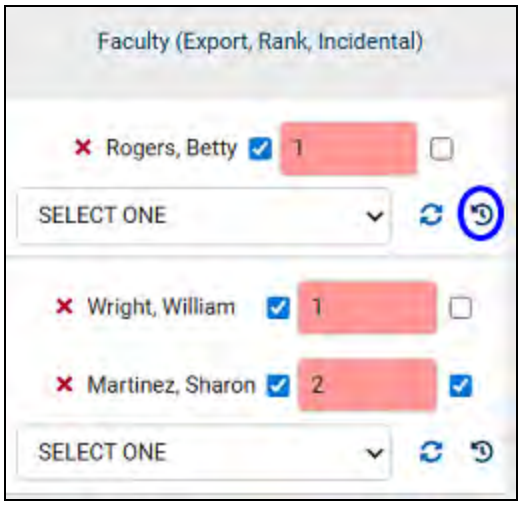
The list of available faculty is controlled by the checkbox, in Course Catalog, labeled "Instructor must be from this department." If this is not checked then all faculty members will show up in the drop-down list.

Additional information, including historical export settings, can be accessed on the Faculty History screen by clicking on the Faculty History button for a specific section.



Faculty History

The Faculty History tracks any changes made to a section's faculty assignments on or after the first academic day of the school year for that building school level.



If ranks are changed for a section's teachers, or if a teacher is added or removed from the section, a Start Date and End Date will be listed on the history to reflect those changes. Start Dates are left blank for teachers who were assigned to that section as of the first day of that master schedule, and End Dates are blank for teachers who are still assigned to that section.

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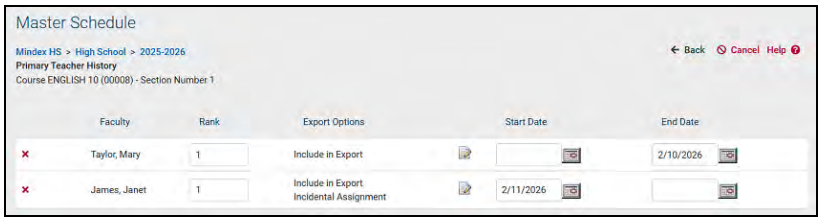


If necessary, users can modify this history to accurately represent the teacher(s) for that section during that school year. Users may delete a record or modify start/end dates and other details as needed, but should keep in mind that these will have an immediate impact on the master schedule and on exports.

To update export options, click the Export Options button. A popup will open, allowing you to specify how this faculty-course assignment should be represented in NYS data warehouse exports.

Options include:

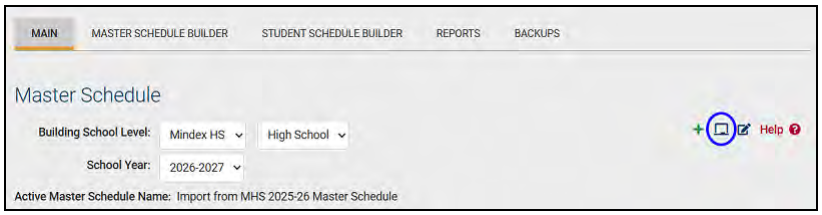
- **Include in Export:** This option is used to specify whether or not this teacher should be included in data warehouse exports for that course section.
- **Incidental Teaching Assignment:** This option is used to specify whether or not that faculty-course assignment should be exported as an Incidental Teaching Assignment (reflected in Course Instructor Assignment exports).
- **Instructor Type Code:** This drop-down is used to choose "Substitute" or "College Course" for the selected faculty member. If anything other than "None" is chosen here, the value will be reported in Field 15 of the Course Instructor Assignment extract.

Master Schedule Whiteboard

The whiteboard is a graphical representation of your master schedule which allows users to easily review and modify a master schedule. The whiteboard grid displays course sections arranged based on teacher schedules rather than by department and course. The whiteboard allows users to perform all functions available in the standard

Master Schedule Editor and introduces the ability to perform drag-and-drop modifications for course sections.

To edit the master schedule using the whiteboard method, ensure that no other users are currently editing that master schedule (refer to the Current Master Schedule Editing Sessions list), then click the Master Schedule Whiteboard button.

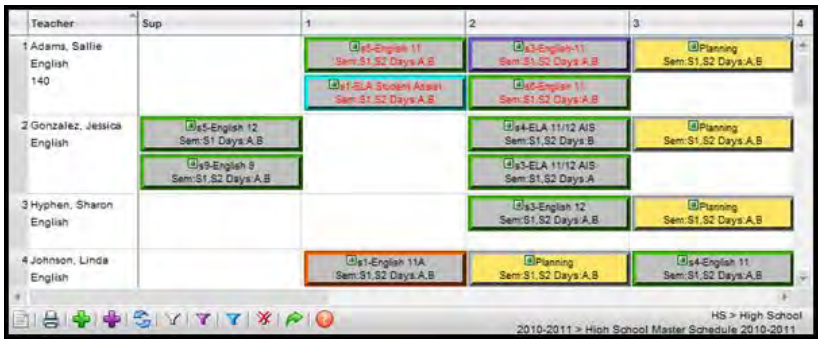


The whiteboard interface will open in full-screen mode. To exit the whiteboard, click the Done button in the bottom left corner to return to the **Scheduling > Master** Schedule sub-module.

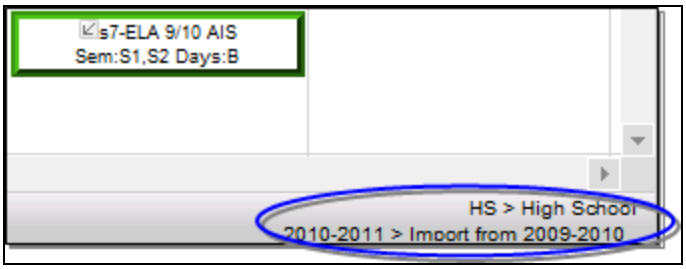
Note: Session timeouts are disabled when working with the whiteboard. Users will not receive messages regarding session timeouts and will not automatically be logged out of SchoolTool after a pre-defined amount of time. Because the master schedule is essentially locked for editing while a user has an active whiteboard session, users should be sure to properly exit the whiteboard editor when they are done working.

When first entering the whiteboard, the screen will display schedules for all teachers who teach in the highest ranked department's (based on department ranks in **Maintenance > Faculty > Department)** by default. All departments, including those currently marked as "Inactive" are available for the whiteboard screen.

The default view includes any teacher who is assigned to that department, regardless of whether or not they currently have courses assigned. Course sections will be shown for all semesters, cycle days, periods, and section counts. Users may configure the appropriate filter(s) as described below to adjust the data available on this screen, as well as the portions of that information that are shown or hidden.



The bottom right corner of the screen shows the Building and School Level on the top line and the School Year and Master Schedule Name for the master schedule being modified.



The whiteboard screen displays course sections based on the specified filter criteria. Each section is represented by a single “block” corresponding with the appropriate teacher and period.

Note: If multiple teachers are assigned to a section, the section block will be shown only for the “primary” teacher assigned to the section in the Master Schedule, based on the rank assigned in the Master Schedule Editor. All additional teachers will be displayed in a box at the bottom of the pop-up window when viewing section details.

Color-Coded Section Blocks

Section blocks are color-coded to provide visual indication of the section count. The outline colors represent the following information:

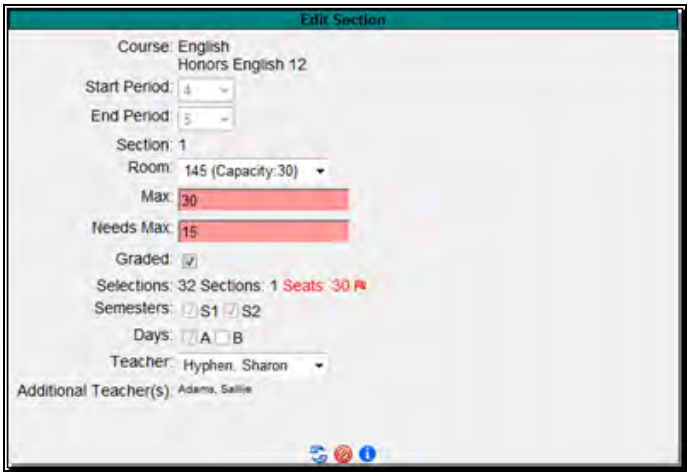
- **Light Blue**: Indicates the section is a singleton (only 1 section of a course)
- **Orange**: Indicates the section is a doubleton (only 2 sections of a course)
- **Purple**: Indicates the section is a tripleton (only 3 sections of a course)
- **Green**: Indicates there are four or more sections of this course.
- **White**: Indicates a section that has been added to the grid and has not yet been saved. These sections will not have a section number, as that number is calculated when data is saved.
- **Gray Fill:** Indicates a locked (“grayed-out”) section. As in the standard Master Schedule Editor, if a section is grayed out, the Start Period, End Period, Semesters, and Days fields may not be modified. These sections can be moved between teachers but not between periods.
- **Yellow Fill:** Indicates a Faculty Duty section.
- **Red Text:** Indicates a section that causes a teacher or room to be double booked (when working in Teacher or Room view, respectively)
- **Section Details Buttons:** When the Details button is a green square, no headcount alerts exist for that course. When the Details button is replaced by a red Alert flag, this indicates that there are more selections than there are seats to accommodate those selections.

Each section block displays basic information about the section. The top line shows the section number and the course name, while the bottom line shows the semester(s) and cycle day(s) the section meets.

Click the Details button (or click the Alert flag, if applicable) to view or modify section details. A pop-up window will open to display this information.

Section Details

- To delete the section, click on the Delete button. The section will be permanently removed from the master schedule once changes have been saved.
- To change the section details, modify the appropriate fields as needed and click the Update button to apply the changes. If required information is not entered or any fields contain an invalid entry, an error message will appear at the bottom of the window. The error must be corrected before the changes may be applied. These changes will be made in the Master Schedule once the user saves their work.
- To return to the white board without applying any changes, click the Cancel button.



The following fields are available here:

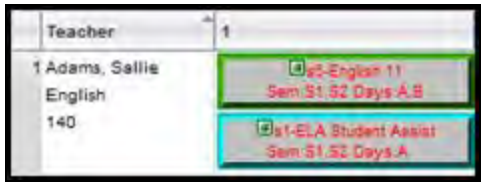
- Course Department: The department to which the course is assigned.
- Course Name: The name of the course.
- Start Period: The period in which this section starts (displays “Sup” for supplemental courses).

- End Period: The period in which this section ends (displays “Sup” for supplemental courses).
- Section: The section number.
- Room: The room in which this section meets.
- Max: The maximum headcount for this section.
- Needs Max: The maximum Needs headcount for this section.
- Graded: Indicates whether or not the course is designated as a graded course.
- Selections, Sections, Seats: The number of student selections for that course, the number of sections that exist for that course, and the number of seats that exist for that course (when there are more selections than seats for a course, all sections will display the Seats count in red text with a flag alert).
- Semesters: The semesters in which this section meets.
- Days: The days on which this section meets.
- Teacher: The primary teacher assigned to this course (based on the rank assigned to teachers for each section in the Master Schedule Editor).
- Additional Teacher(s): Other teachers assigned to this section. If no other teachers are assigned to the section, this field will not be visible.

  Note: The Department, Course Name, Section Number, # Sections, and Additional Teacher(s) fields may not be modified from this window.

Additional Information about Whiteboard Sections:

- Section blocks display red text when a section causes a teacher to be double booked for that period. (This functionality is paralleled in Room View, although the red text is used to indicate room conflicts rather than teacher conflicts)



- When adding or editing a course section, the Teacher drop-down will display teacher names in red if assigning that section would cause that teacher to be double booked. (This functionality is paralleled in the Room drop-down of a section when using Room View, although the red text is used to indicate room conflicts rather than teacher conflicts)

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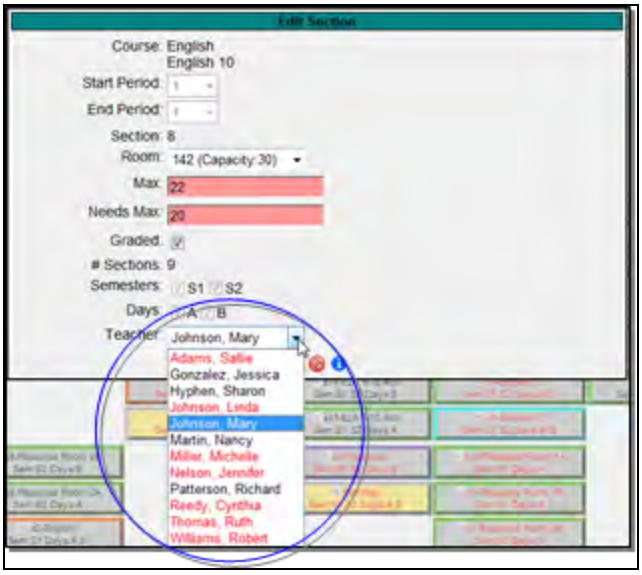
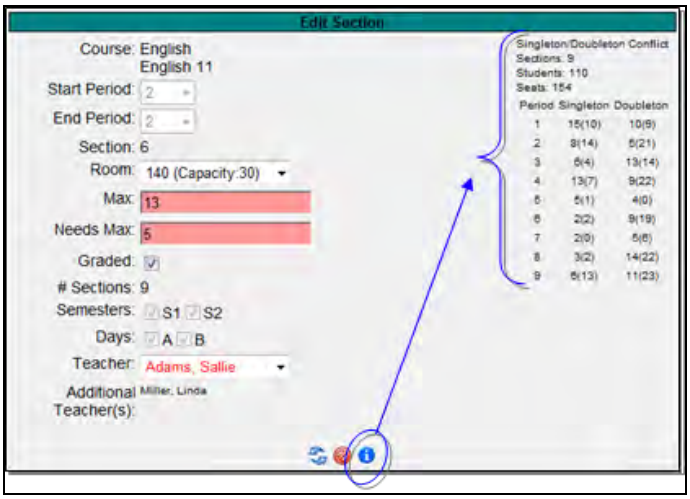
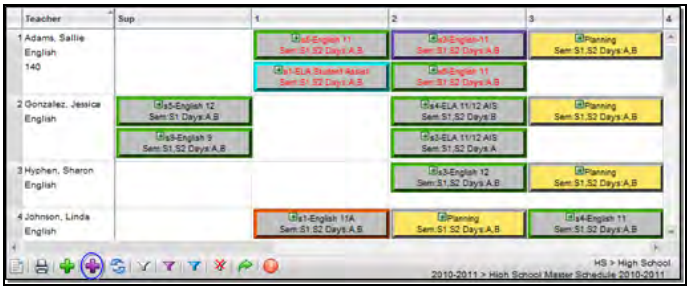


- When viewing section details, users can click on the Singleton/Doubleton Conflict Matrix button to see mini conflict matrix. This will show how many other singleton and doubleton courses are in the same periods as this one, along with how many students have requests for both.

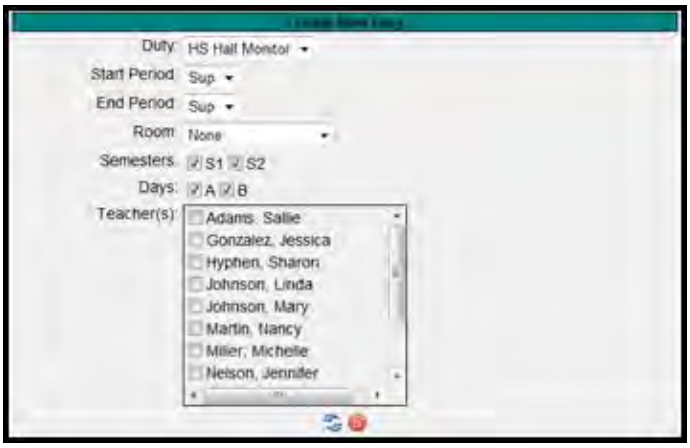


Note: When modifying section details, alert changes due to modifying max headcounts will not be reflected until after the whiteboard session is updated or saved in order to apply changes to all sections of that course.

- To add a new faculty duty, click the Add New Duty button in the toolbar.

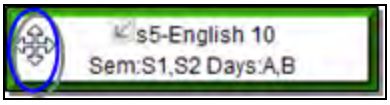


- A new window will open, where users can specify the details for that duty. To assign the duty to multiple teachers, use the checkboxes to select all faculty members from the list. A new duty section will be added for each selected teacher.



Working with Drag-and-Drop Functionality

To move a section, place the curser over the section block. The cursor will change to an arrow. Click and drag the section to the desired position (the window will scroll as needed while dragging to a columns on either side or to rows above and below the current position).

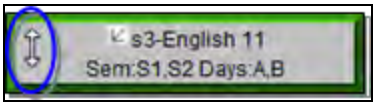


Moving a section will maintain the period length assigned to that section. If moving a section to either Supplemental or to a period that cannot accommodate the length of the section (e.g., moving a two-period course to the last period of the day), a warning message will appear asking the user to confirm this action. To shorten the section and keep it in this location, click OK; otherwise, click Cancel.

Notes:

- When a section is longer than a single period, you must click in the Start period to move the section. Additionally, when moving this type of section, the right border of the block will become a dotted line to indicate that the section is longer than one period. If that timeframe includes overlapping periods, the number of timeslots occupied by that section block will be maintained.

- When moving locked ("grayed out") sections using this method, the direction arrows will only point up and down to indicate that this section can be moved vertically (to a different teacher) and not horizontally (to a different period).



- If a section block is moved from one teacher to another within the Whiteboard, the "primary" teacher will be removed from the section and the teacher to whom the class was moved will be set as the new "primary" teacher. This is also the case when manually editing a section from within the Whiteboard (by clicking the Section Details button in a section block) and selecting a different teacher from the Teacher drop-down.

- The bottom of the whiteboard contains control buttons that allow users to perform a variety of actions.

- The following buttons are available in this area:

- Menu button: Allows users to show or hide teams and to sort by teacher name, department, or team, and switch between Teacher View and Room View.
- Print button: Allows users to print the visible master schedule whiteboard grid using a pre-defined layout. Refer to the section on Printing the Whiteboard Grid before using this option for important information!
- Add Section button: Opens a pop-up window to allow the user to create one or more new sections of a course. Refer to the section on Adding a Section below for more information.
- Add New Duty button: Opens a pop-up window to allow the user to create one or more sections of a faculty duty and assign it to the appropriate staff. Refer to the section on Adding a Section below for more information.
- Update button: Applies any changes made on the whiteboard without saving. This will cause new sections that have been added to no longer appear with a white border and will instead show the appropriate border colors, section counts,

and section numbers. This is purely for visual purposes; these changes are not saved until the user clicks the Save button.

- Filter Teachers button: Filters the teachers on the screen. Refer to the section on Filters below.

  Note: The whiteboard screen is updated (see Update button, above) when the Teacher filter is applied.

- Filter Periods button: Filters the periods shown on the screen. Refer to the section on Filters below.
- Filter Courses button: Filters the courses shown on the screen. Refer to the section on Filters below.
- Reset Filters button: Clears all active filters and re-applies the default filter settings for that user.
- Done button: Exits the whiteboard screen and returns the user to the **Scheduling > Master Schedule**sub-module. Clicking this button will save any current filters for that user (these are saved individually for each building, school level, and school year).

  Note: If there are unsaved changes on the whiteboard when the user clicks this button, a warning message will appear asking the user to confirm this action. Click OK to save and exit the whiteboard. Click Cancel to exit the whiteboard without saving your changes.

- Online Help button: Opens the online-help for the Master Schedule (for users with page-level help enabled).

Using Filters

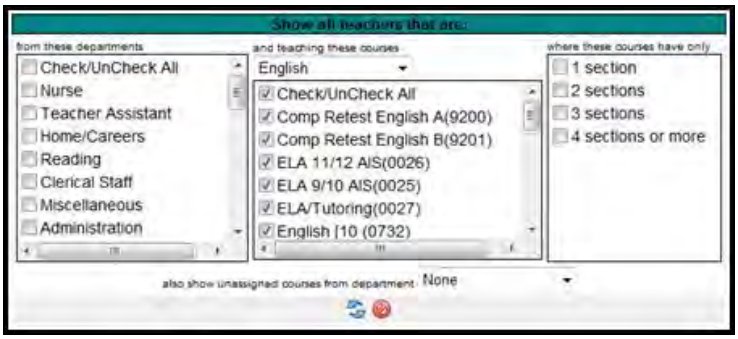
The three whiteboard filters may be used in conjunction with one another to determine which information is shown on the whiteboard. These filters can easily be configured and applied while working in the whiteboard. After the whiteboard data is loaded, the user can apply the Periods and/or Courses filters to show or hide information based on the data provided from the Teacher filter.

To use filters, click the appropriate filter button in the bottom left corner of the screen and configure the options as desired. Click the Update button to apply the filter to the whiteboard screen, or click the Cancel button to return to the current view without making changes.

Available Filters:

1. Filter Teachers : This filter determines which teachers' schedules are displayed on the whiteboard.

Note: In Room View, this is replaced by a Filter Rooms option, which functions similarly except that it filters based on room assignments rather than courses.

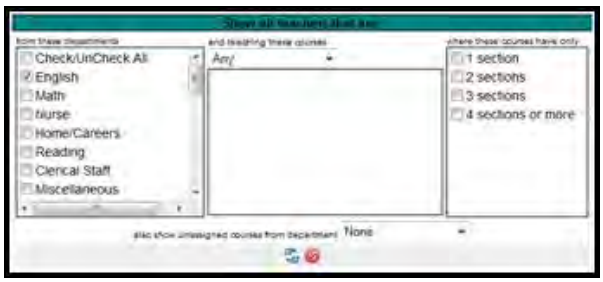


This filter allows the user to:

A. Show teachers from selected departments (left column). Using the checkboxes, select any number of departments. Only teachers from the selected department(s) will be included on the whiteboard.

   For example:

   - To show only teachers assigned to the English department, select English from the department column, set the courses column to “Any,” and leave all section counts unchecked.



B. Show teachers assigned to selected courses (middle column). Use the department drop-down in this column to limit the courses listed here to a specific department and use the checkboxes to select all appropriate courses from the list that appears below. Only teachers in the selected department (from the left column) who are teaching the selected course(s) (from the middle column) will be shown.

   For example:

   - To show only teachers from the Physical Education department who are teaching any course in the Health department, select Physical Education from the department column, select all Health courses from the courses column, and leave all section

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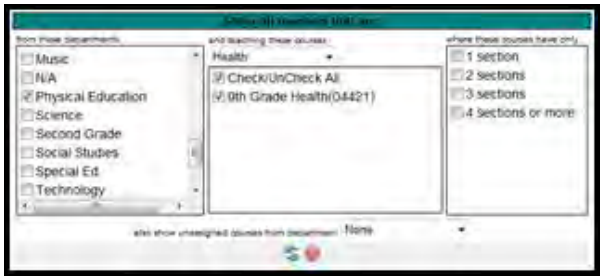
counts unchecked.



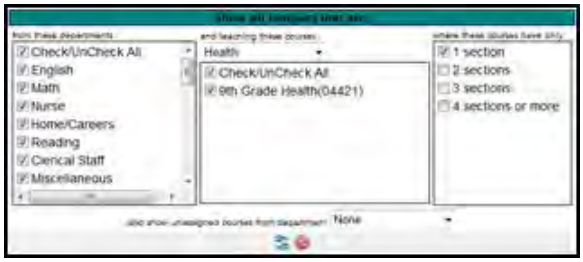
C. Show teachers who have courses with a certain number of sections. Depending on the other options selected, this may return teachers who are teaching *any* course with the selected number of sections or a specific course (or set of courses) with the selected number of sections.

For example:

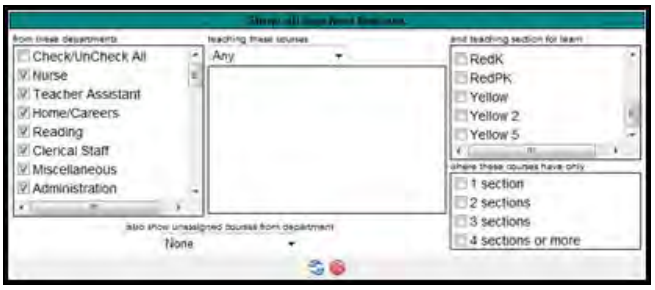
- To show only English teachers who also teach a singleton course, select English from the department column, select “Any” from the courses column, and check the “1 section” option from the section count column. An English teacher with a Drama course (from the Arts & Music department) that is a singleton would then be included on the grid even though the Drama course is not part of the English department.

- To show all teachers who are teaching a singleton course in the Health department, select all from the department column, select Health from the courses column (with all courses in this department checked), and check the “1 section” option from the section count column. Any teacher who is teaching a singleton Health course will display on the grid, regardless of the teachers’

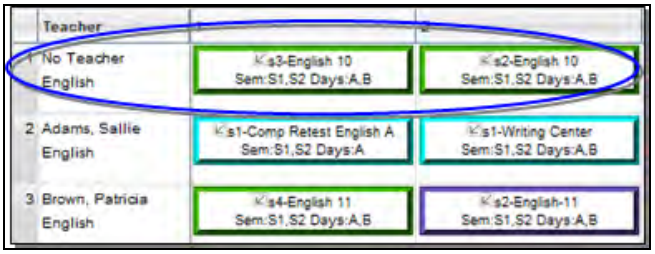
department assignments.



D. Show teachers who are assigned to course sections from a specific team. This option is available only if the master schedule being viewed is for a building/school level/school year that contains teamed courses.



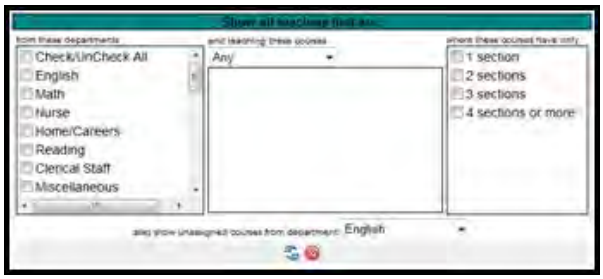
E. Also show unassigned course sections from a selected department (drop-down option at the bottom of the screen). This option allows users to include sections from the selected department that have not been assigned to a teacher. Selecting a department from this drop-down will add a row at the top of the whiteboard screen where all sections that have no teacher will be displayed.



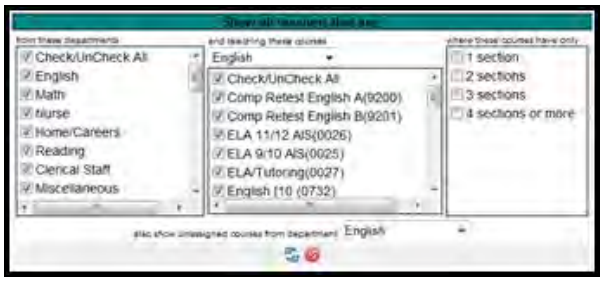
This option functions independent of the other columns above and is not restricted by any options selected in this filter dialog, this option simply allows the user to include or exclude unassigned course sections from a selected department *in addition* to the selected teachers. Only one department at a time may be selected from this option.

For example:

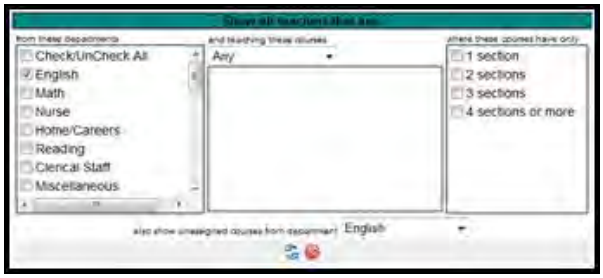
- To show only English course sections not yet assigned to a teacher, uncheck all departments in the department column, select “Any” in the courses column, and select English from the “unassigned courses” department drop-down at the bottom. The whiteboard will show only the “No Teacher” row with any unassigned English course sections.



- To show all English course sections, including those not yet assigned, select all departments, select all English courses, and select English from the “show unassigned” drop-down. The whiteboard will show all teachers who are assigned to an English course as well as the “No Teacher” row with any unassigned English course sections



- To show all teachers from the English Department and all English sections not yet assigned to a teacher, select the English department, select Any for courses, and select English from the “show unassigned” drop-down. The whiteboard will show the “No Teacher” row for all unassigned English course sections, as well as all teachers assigned to the English department.



Note: Applying the Teacher filter will cause new sections that have been added to no longer appear with a white border and will instead show the appropriate border colors, section counts, and section numbers. This is purely for visual purposes; these changes are *not* saved until the user clicks the Save button.

2. Filter Periods : The Periods filter allows the user to show or hide specific periods on the whiteboard screen. This filter contains a list of all periods, as well as checkboxes for “Sup” (supplemental courses). “Sup” is listed twice: once at the beginning of the list, and again at the end of the list.

By default, the “Sup” checkbox at the beginning of the list is unchecked, while all other periods and the “Sup” checkbox at the end are checked. Therefore, all periods are shown and supplementals are shown in the last column on the screen (to show supplementals in the first column, check the first “Sup” box and uncheck the last “Sup” box).

Notes:

- This filter does not impact which teachers shown on the screen.
- When a period is hidden, sections meeting during that period are not visible on screen. For sections that span multiple periods and one of those periods is hidden, the remaining portion of the section block will still show in the unhidden periods.
- If sections are edited or added to a hidden period, those sections will be added appropriately but the user will not see them on the screen until the filter is updated to show that period.

3. Filter Courses : The Courses filter allows the user to show or hide specific courses that meet the selected criteria (specific departments/course(s), meeting times or number of sections). It also allows users to show or hide faculty duties, and to filter by team if applicable. By default, all items are shown (checked).

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Notes:

- This filter does not impact which teachers are shown on the screen.
- When sections are added or edited, they will not be visible unless they meet the checked criteria for semesters and/or days. These can be made visible by modifying the filter appropriately.
- The section count portion of this filter is not applied to new sections until the user has clicked on either Save or Update from the main whiteboard screen.

Adding New Sections

To add sections of a course to the master schedule, click the Add Section button. A pop-up window will open. Enter the details for the new course section(s) and click on the Update button to add the courses. If required information is not entered or any fields contain an invalid entry, an error message will appear at the bottom of the window. The error must be corrected before the changes may be saved. Click the Cancel button to close the window without adding the section(s).

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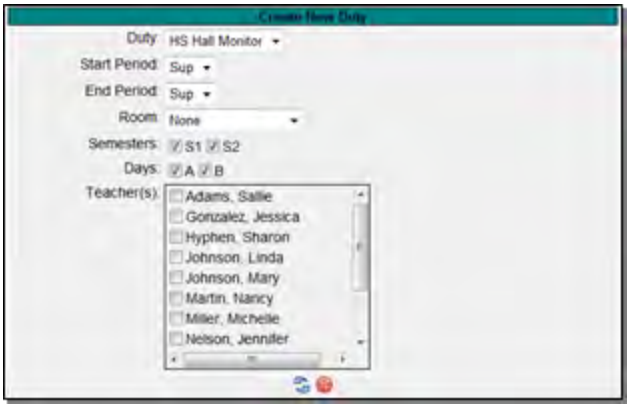
Course Section



Faculty Duty Section

The following details must be entered here:

- Course Department (drop-down): Lists all available departments. Select a department to filter the Course Name drop-down. This field is set to “Any” by default.
- Course Name (drop-down): The course to which these sections will be added.
- Duty (drop-down): Lists all available departments defined in **Scheduling > Faculty Duties**.
- Start Period (drop-down): The period in which this section starts. This is set to “Sup” by default. The start period must be the same as or earlier than the end period.
- End Period: The period in which this section ends. This is set to “Sup” by default. This must be the same as or later than the start period.
- Room: The room in which this section meets.
- Max: The maximum headcount for this section.
- Needs Max: The maximum Needs headcount for this section.
- Graded: Indicates whether or not the course is designated as a graded course.
- Semesters: The semesters in which this section meets.
- Days: The days on which this section meets.
- Teacher: The primary teacher assigned to this course (the teacher for whom the section block is displayed on the whiteboard). Only one teacher may be assigned using this screen. To assign additional teachers, users must do so using the standard Master Schedule Editor. Only teachers who are visible on the current whiteboard view (based on the Teacher filter) may be assigned to a section.

  Note: If this section is assigned to a period, semester, or cycle day that is not displayed in the current whiteboard view, the new section will not be visible after it is added unless the user updates the filter to include the appropriate criteria.

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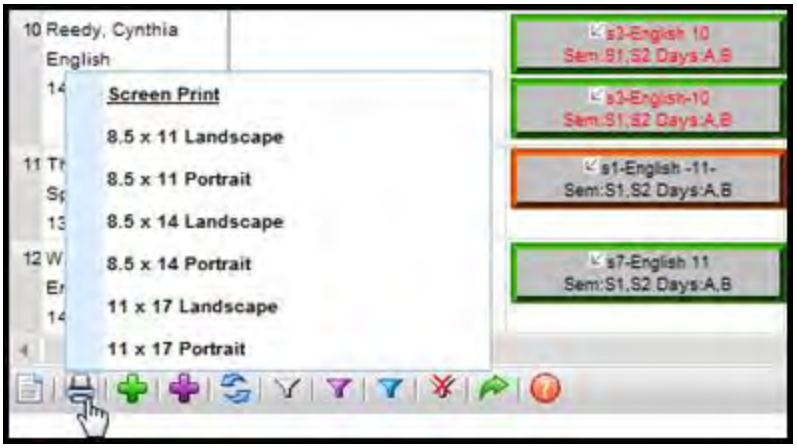
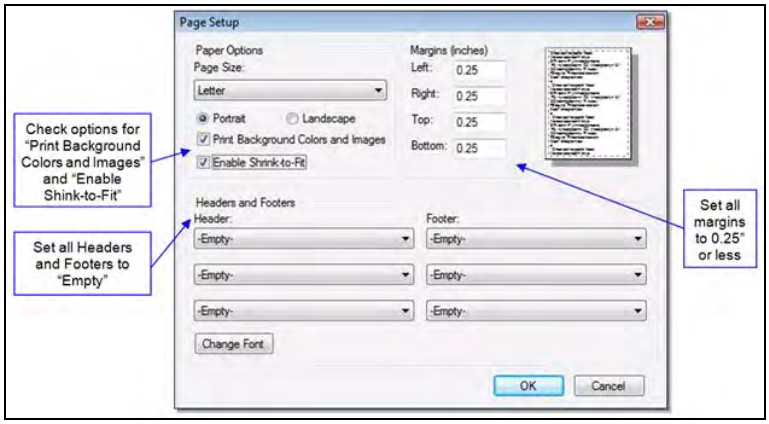
Printing the Whiteboard Grid

Users can use the Print button to select a pre-defined screen print size, which will allow the user to print the currently active whiteboard grid at any time.

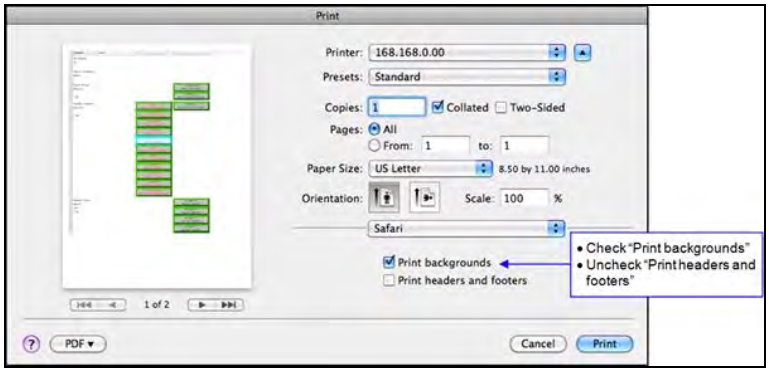


Important: Because print configurations may vary between browsers and individual users, it is important to set print options to the recommended settings before selecting any print option in order to obtain proper rendering of the whiteboard grid. Users should verify their printer settings before continuing. It is also important to remember that these settings are generally retained by the browser and will remain in effect for all print jobs unless the user modifies the settings again after printing.

- For Internet Explorer, settings should be defined as follows:



- For Mac users, settings in Safari should be set as follows:



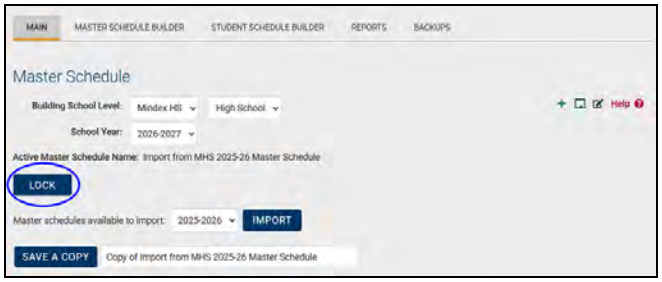
Locking the Master Schedule

In SchoolTool, the term "locking" refers to the process of securing certain portions of the Master Schedule to prevent further changes. We can perform incremental locking, allowing us to lock only a portion of the scheduling tools, and later final locking to secure the remaining tools.

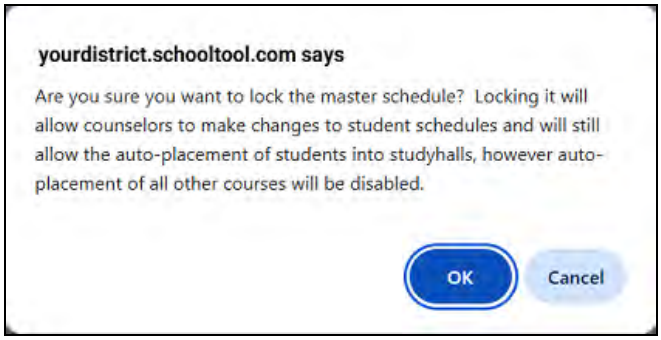
For instance, once the Master Schedule is built, all rooms and teacher assignments have been completed, and the majority of students have been loaded into their schedules either manually or through the Student Schedule Builder, an initial lock can be performed. This disables most of the Master Schedule Builder tools, but still allows counselors to work through all last-moment scheduling conflicts with their schedule-editing tools (available in the Counseling module).

Performing an Incremental or Initial Lock

1. Navigate to the Master Schedule Editor for the appropriate school building and year. Remember, the Master Schedule Editor is the “Main” tab.
2. Click once on the button labeled "**Lock**”.



3. Read the warning carefully, and click OK. This will incrementally lock the Master Schedule.



Now that the schedule is locked, you will notice many of the scheduling tools have been disabled. You can no longer:

- Create a new Master Schedule from scratch (i.e. the Add button on the Main tab is gone).
- Import a Master Schedule (i.e. the Import button and drop-down list are gone).
- Use the Master Schedule Builder to manipulate Constraints or build sections (i.e. the MSB tab is gone).
- Create Backups of the Master Schedule (i.e. the Save Copy button and Backups tab are gone).
- Manipulate Student Schedule Builder Constraints and Priorities (i.e. all SSB options except for Run are hidden).
- Manually schedule students, batch edit schedules or override manual schedules through the Student Schedule Builder.

Once counselors are done with any manual changes to schedules to resolve individual student conflicts, a final scheduling run can be done that simply places students into study halls wherever they have available timeslots in their schedules. Once study halls are in place, you may perform a secondary or "complete" lock on the Master Schedule. This secondary lock essentially disables the Student Schedule Builder tools and finalizes the Master Schedule.

Note: It is not required that you perform a final, complete lock of the Master Schedule. Leaving the Master Schedule incrementally locked will allow users to perform updated study hall overlays as the marking periods or semesters progress, thus giving counselors the greatest flexibility in editing student schedules.

Performing a Secondary Lock

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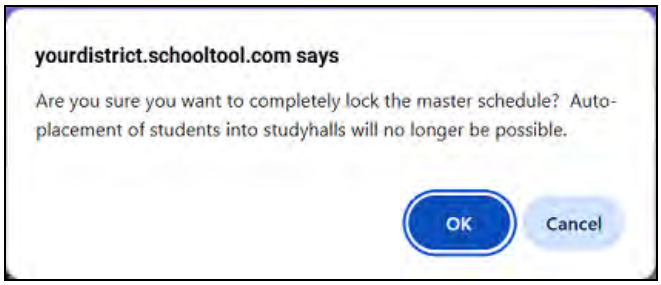
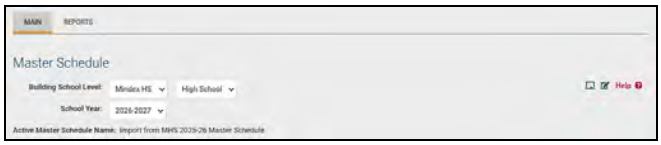
1. Navigate to the Master Schedule Editor for the appropriate school building and year. Remember, the Master Schedule Editor is the “Main” tab.
2. Click once on the button labeled "**Lock**".

3. Read the warning carefully, and click OK. This will completely lock the Master Schedule.



Note: Only the automatic scheduling tools are disabled by locking. Counselors will always be able to manually schedule and reschedule students.



Note: At this time, it is not possible to lock only certain portions of a master schedule.

Note: Locked master schedules cannot be unlocked from this area. Users with the appropriate permissions can unlock master schedules from within **Maintenance > Scheduling > Unlock Master Schedule**.

Importing/Restoring from a Previous Master Schedule

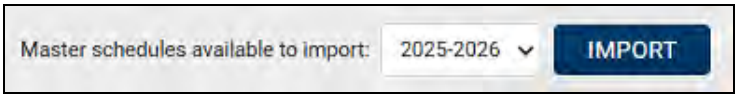
Creating a new master schedule based on a previous year's schedule only requires that we have a previous year’s master schedule available to us that is locked. This process can also be used to restore a previously saved master schedule backup.

What is imported from the master schedule?

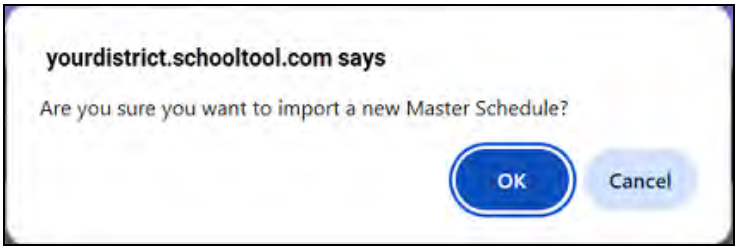
- All course sections, including period, semester and cycle day assignments.
- Room assignments except where rooms either no longer exist, or have been renumbered.
- Teacher assignments (except where teachers no longer exist).

To import a Master Schedule from a previous year:

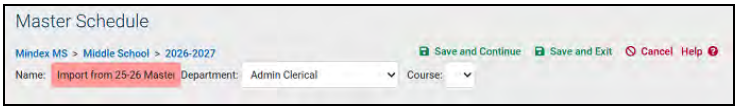
1. Select the appropriate source year from the “Master Schedules available to import” drop-down and click the **Import** button.



2. Confirm that you want to import a new Master Schedule by clicking the OK button.



3. Notice that your new Master Schedule now has a name that starts with “Import from” followed by the name of the imported year’s Master Schedule. Rename this schedule if needed and click the Save button.



Note: Whenever the Master Schedule is imported from a previous year, a copy of the current Master Schedule (if one exists) is automatically saved prior to the import; this saved copy can be found in the Backups tab.

Making a Backup of the Master Schedule

During the course of your scheduling process, you may want to experiment with different versions of the Master Schedule. For instance, you may be working along in your scheduling process, decide to save the current Master Schedule, make changes, and then want to revert to the schedule you last saved. You can toggle back and forth between Master Schedules using this feature.

Backups of the master schedule will include the following information:

- All Master Schedule information, including course sections, teacher assignments, and room assignments
- All Student Schedules

- All Student Schedule Builder constraints and run options

  Note: Master Schedule Builder constraints are not backed up during this process and could be lost.

Use the following process to make a backup copy of your Master Schedule as it exists right now.

1. Type the desired name for your backup copy into the text box next to the Save Copy button.

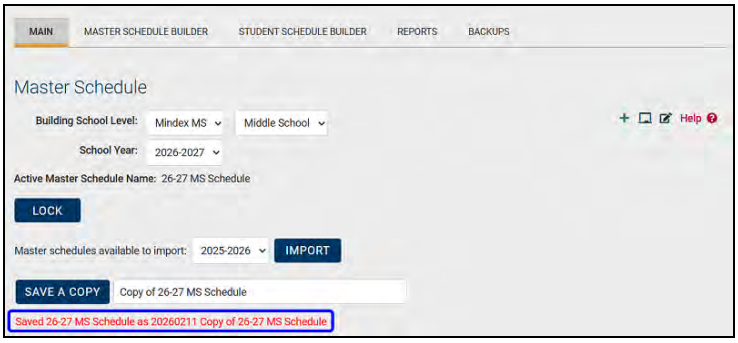
   Tips and Information

   Tip: Always name your backups (saved copies) effectively. Since you may have several backups as you complete your scheduling process, it is advisable that the name of each backup includes as much information as possible. For instance, “Backup of 08-09 Import” is a much better name for a saved copy than “Bob.”

   Note: SchoolTool will automatically add a timestamp to the beginning of your backup’s name. This will include the year, month, and date (in YYYYMMDD format) that the backup was saved.

   Note: Backup names may contain a maximum of 50 characters, nine (9) of which are reserved for the timestamp. Users may manually enter up to 41 characters for a backup name

2. Click on the “Save Copy” button. After a brief pause, the screen refresh with a message confirming that your backup file was saved. The message will display the timestamp plus the name.



Master Schedule Builder

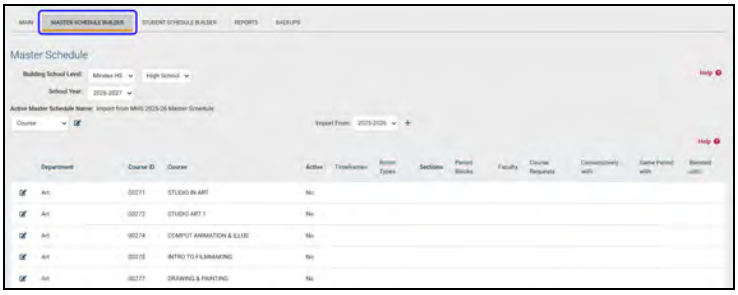
SchoolTool's Master Schedule Builder is a tool that allows school personnel to create the best-fit schedule using student requests, course definitions, and course, faculty, room and period constraints. Within the Master Schedule Builder, we can define our constraints and run "the tool" that will create this schedule, incorporating staff, room resources, and courses into a single Master Schedule.

The Master Schedule Builder can also be used to build part of a schedule. You may for instance use it to build core classes after manually creating sections for singletons and doubletons. Or, you may use it to create singletons and doubletons once core class sections have been built and tweaked.

Note: If you plan to rollover a master schedule from a past year, or build a schedule manually from scratch, you can ignore this section.

To use the Master Schedule Builder:

1. Make sure you are in the Scheduling module's Master Schedule sub-module.
2. Click on the Master Schedule Builder tab toward the top of the screen.



3. When you first enter the Master Schedule Builder, you will be presented with a screen containing the following elements:
    A. Constraints and Build options: Constraints are where we define any limiting considerations while building our schedule. Examples of typical constraints might be that an Art class needs to be taught in a specific room, that teachers cannot teach more than three consecutive periods, or that Mr. MacGyver cannot teach during periods 1, 2 or 3.

    This drop-down defaults to Course, though Faculty, Room, Period, Union Rule and Build Schedule can also be found here. Build Schedule, though listed here, is not an actual constraint, rather where we would go to perform a build of the new Master Schedule.

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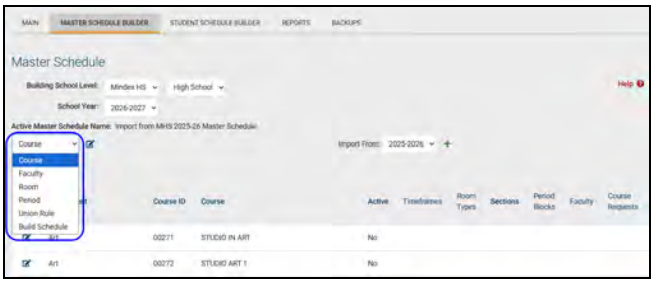


B. Batch Activate/Inactivate: A method of quickly activating and inactivating courses for this particular run of the scheduling tools. This button only appears when you are viewing Course constraints.
C. Import From: You can use the "Import Master Schedule Builder Setup" ➕ button to build all course constraints based on the previous year's master schedule. This does not re-import last year's constraints; rather, it analyzes your master schedule for information such as teachers, timeframes, number of sections, and headcounts.

   Using this button when course constraints already exist will not overwrite existing data but will fill in missing data.

Defining Constraints

Course Constraints

Course constraints tell the Master Schedule Builder how to schedule classes and build sections. Each course has its own set of constraints.

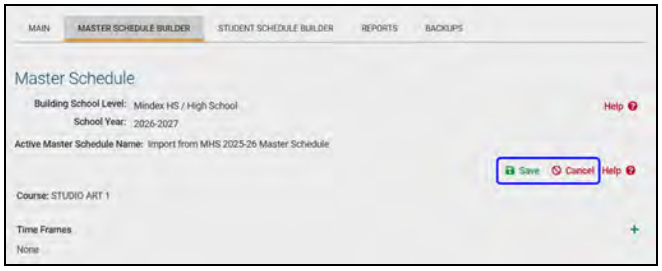
1. Make sure you are in the Master Schedule Builder in the proper Master Schedule, for the correct year and building.
2. Select the **Course** constraint from the drop-down list.
3. Locate the course you would like to edit, and click on the Edit button to view that course's constraints.

   Note: As in many other places in SchoolTool, you may click on the column heading to sort the list of courses by Department, Course ID, or Course name. This will make it easier to locate a specific course.

4. Change and add course constraint details.
5. Course Constraint options are essentially instructions for the Master Schedule Builder. All of the choices we make in this window define the framework and rules used to create course sections. These are not actual courses or course sections, but the structure of possible course sections.
6. The course constraints edit window contains the following components:

   Note: Any courses which appear in this list without details such as Active status, Room Type, Max Sections, etc. need to be defined. The lack of details indicates a new course that was not offered in previous years. Without details, this course cannot be scheduled.

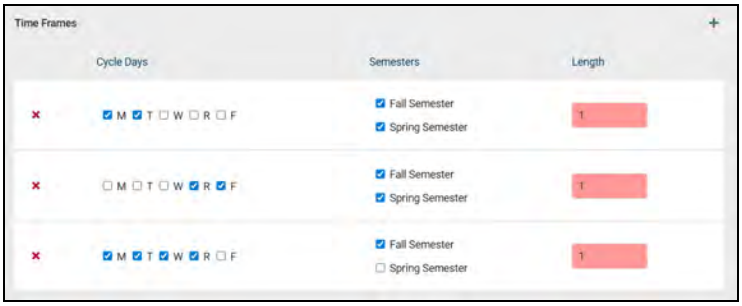
7. Save, or Cancel, your changes by using the Save and Cancel buttons at the top of the Course Constraints window.



Time Frames

This section allows you to designate specific meeting patterns for this course. You can restrict which cycle days this course can meet, which semesters, and the length (number of periods). Use the check boxes to designate cycle day(s) and semester(s). For Length, enter a number in the numeric field.

The following example uses a 5-day cycle scheme.



Note: At least one Time Frame must be defined or the Master Schedule Builder cannot create sections for this course.

Note: All variations of time frames should be defined here. For example, if there are some sections that meet in the Fall on cycle days M, W and F and other sections that meet in the Spring on cycle days T, R and F, then there should be individual time frames for each of these.

1. To add time frame details, click the Add Timeframes ➕button in the top right corner of the Time Frames section.
2. The screen will refresh with options for Cycle Days, Semesters and Length. If there were already time frames defined for this course, the newest time frame will be added to the bottom of the list.
3. Make any changes as necessary:
    - **Cycle days:** What day formats will this course meet? If the course will always meet every day, select all options here. If the course will only be on certain days, select those. If there are multiple patterns for this class, add additional time frames.
    - **Semesters:** Select the semesters that this course meets. If the course meets for the entire year, select all semesters. If the course will meet either semester 1 **or** semester 2, then create two time frames for this course.
    - **Length:** Type in the length of the class, in periods. Length is required. Most classes will simply have a "1" here.

      Note: If the course you are defining is a lab, you may have multiple time-frame rows so you can define every scenario.

      Note: If this course actually has 1-period long options **and** 2-period long options, you cannot define both here. You will need to create a new course in the Course Catalog, and add new constraints for the new course.
4. When you have finished defining time frames, either click the Save 💾 button in the upper right to save your work and move on to the next course, or continue to the next section of the constraint screen.

Room Type

Room type refers to the room type or types where this course can be taught. You may click once in a checkbox to select it. Click again in the same checkbox to deselect it.

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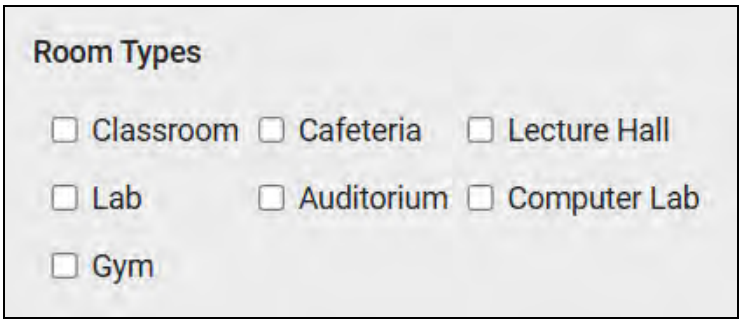
You must choose at least one room type or the course section will not be created.

You may choose multiple room types for a single course.



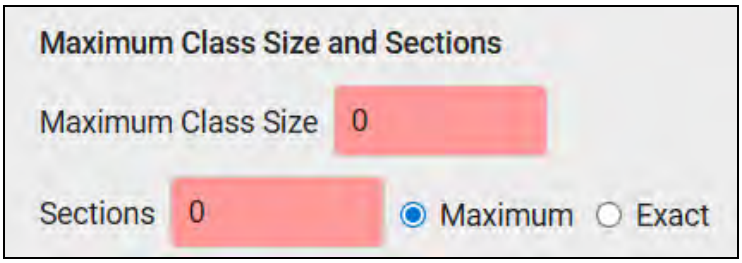
Note: Courses can be taught in one or more room types. Room numbers are assigned room types in another part of SchoolTool, and the Master Schedule Builder will use existing room type definitions, and these constraints, to place classes in the correct room types.

Note: Room types are defined and maintained by the district. If the room type you need does not appear, contact your SchoolTool system administrator.

Note: If a teacher is assigned to a room number (i.e. 100) in his/her faculty record, but is assigned to a different room number (i.e. 208) in the Master Schedule Builder (MSB) Faculty constraint, the MSB will try to first match the section(s) to the room assigned in the Faculty constraint (i.e. 208). If that room does not match the selected Room Type, or is not available, the MSB will then try to assign the section(s) to the room number associated to the faculty in the faculty record (i.e. 100).

Class and Section Size

This allows you to set the maximum number of students who can attend each class section and the number of sections that will be created. To set these:



1. In Maximum Class Size, type the total number of students per section.

   Note: Setting this number to zero will not affect the builder. Sections will still be created, but will have a max head count of zero.

2. Type a number in Sections and choose either Maximum or Exact.

3. **Maximum** tells the builder tools to create "up to" this number of sections. Fewer sections may be created if the tools determine all student requests can be satisfied with fewer. Max Sections will never be exceeded by the builder. However, users can still create additional sections manually in the Master Schedule Editor.

4. **Exact** forces the builder to make the exact number of sections specified. No more, no less, no matter the number of students or student requests.

   Note:If you use the Exact radio button, the Master Schedule Builder will create sections even without corresponding student requests.

   Note: *Maximum Sections should not be set to zero.* The Master Schedule Builder will create the required number of sections based on course requests, but if the Maximum Sections is left at zero, no sections will be created.

Active Status

The Active flag allows you to designate that this course is or isn't considered when the Master Schedule Builder is run. For example, you can run the Master Schedule Builder with the course active until you have the details set. Then make this course inactive so it will not change. You can continue to run the Master Schedule Builder for other courses, but once this course is inactive, the details will not change.

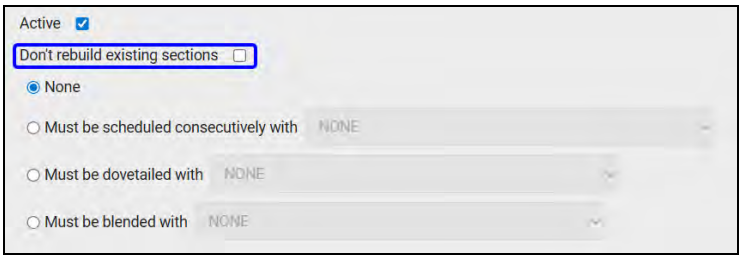
Note: Each course with constraint details (time frames, maximum sections, faculty, etc) is active by default. A course without constraint details is inactive

by default. To change the active status, click once in the checkbox to select or deselect the Active flag.

Note: In some cases, you may need to manually build a section or group of course sections, such as lunches, study halls, or vocational courses which are attended off campus. Whenever you have manually defined section details, make those corresponding courses inactive so your work will not be impacted by the Master Schedule Builder.

Don't Rebuild Existing Sections

This flag allows you to designate that the MSB should ignore any existing sections of this course and build additional sections around those that were previously built by the MSB or by hand.



Note: Sections of a course can be built without this option, then this option can be invoked to build additional sections around those already in place.

Note: If this box is not checked, and sections of this course exist, the MSB will overwrite those sections when a build is performed.

Consecutively Scheduled

You have the ability to tell the Master Schedule Builder to schedule courses consecutively if you know, without a doubt, that the courses will occupy consecutive periods during the day. Some schools may create a humanities block, for instance, where Social Studies and English are taught back to back.

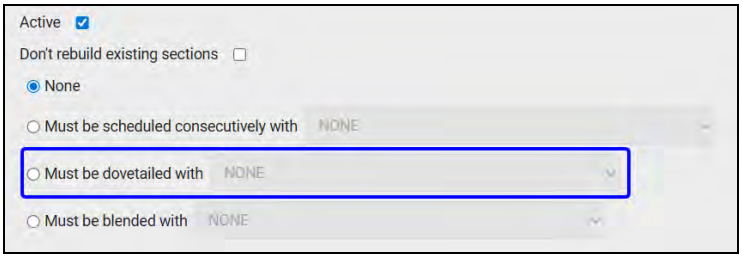
To force this course to be consecutively scheduled with another course, simply choose the other course from the drop-down list labeled “Must be scheduled consecutively with.”

Note: This option does not imply any specific order. That is, the selected courses will be scheduled consecutively, though the builder will determine, based on best-fit, which course will precede the other.

Note: It is not necessary to select this option on both courses in the "consecutive" block. Simply choose one of the two courses to be consecutively scheduled, and the builder will do the rest.

Dovetailed

The Master Schedule Builder can also create dovetailed sections between two courses. An example of this would be PE sections that run on cycle days which alternate with lab sections, or blocked English and Social Studies classes that run for multiple periods on opposite cycle days. Dovetailing works for sections that meet on alternating cycle days within a marking period, or for sections that need to be scheduled into the same period in different marking periods.



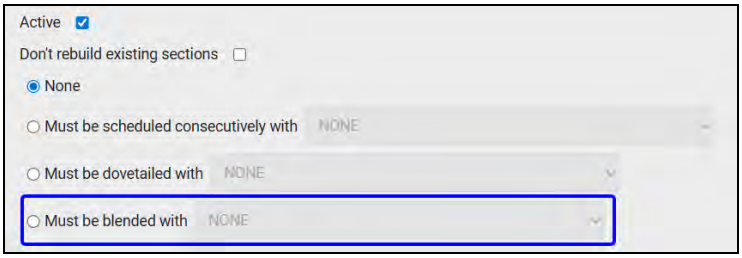
Note: It is not necessary to select this option on all courses that will be dovetailed. If two courses are being dovetailed, simply choose one of the two courses to be dovetailed and the builder will do the rest. If two or more are being dovetailed, as with quarterly specials that must be in the same period though in different quarters, create a "daisy chain" – dovetail the first to the second, the second to the third, and the third to the fourth.

Note: Courses only appear in this list if they are active in the current year's Course Catalog.

Blended

The Master Schedule Builder can also create blended sections. These are typically exceptions where the MSB will double book a teacher and a room so that a section of a primary course and a section of a secondary class can be

scheduled at the same time. An example of this would be a section of Regents English and a section of Special Ed English which are taught together at the same time, same room, and by the same teacher.



Note: When this option is used, the primary course head count is set to the max that matches the other non-blended sections. Then the secondary course is set to a smaller max. When the sections are built, the MSB will reduce the head count of the primary course section so that when combined with the head count of the secondary course section, the max head count is not exceeded.

Batch Activating Course Constraints

All courses have, as a course constraint, an Active checkbox that tells the Master Schedule Builder to create sections only for courses that are currently active*. As a user, we have the ability to manually schedule some courses, and then inactivate them so the scheduling tools will not overwrite our changes. This can be very handy for hard-to-schedule courses when we know exactly when and where they will be scheduled.

Note: The one exception to this is when the check box for "Don't rebuild existing sections" is checked. In this case, even if the course remains active, any existing sections will not be overwritten.

Though the **Active** option is within the course constraints discussed in the next section, we also have the ability to control the active status of all courses at the same time.

To Batch Activate/Inactivate Courses:

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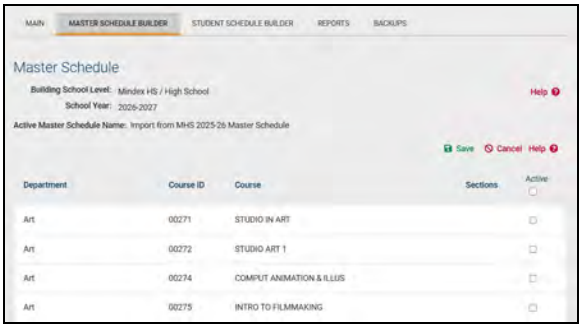
1. Select the **Course**constraint from the drop-down list.
2. Click on the Batch Activate/Inactivate button.

3. Use the checkboxes in the right-most column to mark each course Active, as appropriate. Courses marked inactive (no check mark) are ignored by the Master Schedule Builder tools.



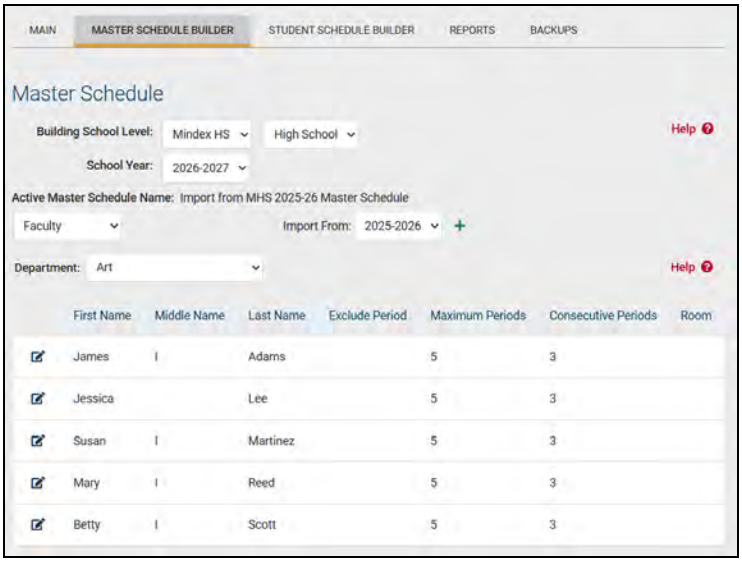
4. Use the Save and Cancel buttons to either Save all of your changes or Cancel all of your changes.

   Note: The checkbox at the very top of the screen, beneath the word Active, will select **all** other checkboxes, and if unchecked, will uncheck all other boxes. Clicking the red Cancel button will exit you from the Batch Activate mode without saving anything.

   Note: Courses not marked as active will be ignored by the scheduling tools, though these “non-active” courses may still have sections and students scheduled into them. To deactivate a course for the entire year, refer to the section on *Course Catalog*. To force a "No" to appear in the Active column for all courses, you must first select all to make all courses Active, then Save, then click the button again, deselect all, and save again. This is only necessary if you are configuring course constraints from scratch.

Faculty Constraints

Users can set faculty-specific restrictions for individual teachers which may differ from general union rules or course constraints. For example, a particular teacher may only teach part time, so his/her individual schedule constraints can be defined here. This information will override the constraints set in the Union Rule view.



Note: Ignore the Import From drop-down and Import Master Schedule Builder Setup ➕ button seen at the top of this screen.

To define or change Faculty constraints, from within the Master Schedule Builder tab:

1. Select **Faculty**from the drop-down list. The screen will refresh with a list of all faculty in the default department for the selected building.
2. Select a **Department**from the drop-down list. This will help you to target teachers in a particular department.
3. To edit constraints for a particular faculty member, click once on the Edit button to the left of the faculty name.

   The screen will refresh and the row for that faculty will display editable options.

4. Make appropriate changes to the faculty member’s row.

- **Exclude Period** allows you to set specific periods in each semester which this teacher cannot or does not teach. Click once in the checkbox to select a period that this teacher is restricted from instructing. For example, a high school teacher who teaches in another building (middle school) in the morning might have constraints set blocking the first four periods for each semester for this building.
- **Maximum Periods** defines the number of periods this individual teacher can teach in a day. The value you enter here will override the global union rules. This field is numeric and required.
- **Consecutive Periods** defines the number of periods this individual teacher can teach in a row. The value you enter here will override the global union rules. This field is numeric and required.

  Note: The Maximum Periods and Consecutive Periods must be greater than zero or an error will result.

- **Room** is the room that the teacher primarily teaches in. If a room is assigned here, it will override any room assignment (such as homeroom) that this teacher has in their faculty record. If this is left blank, the builder will try to schedule this teacher so all of their classes are in their homeroom.

5. Save changes to this faculty's row when you have finished by clicking on the Save button to the left of the row. The screen will refresh and constraints for this faculty member will appear in read-only mode among the other rows.

   Note: Once you have edited an individual teacher's constraints, it is not possible to remove the details, as these fields become required when edited.

   Note: Make sure you have left enough unblocked periods for this teacher to teach the sections you have already defined in the Course

constraint screens. If there is a conflict, and the Master Schedule Builder feels this teacher has already been assigned to a maximum number of sections, then this teacher may not get all of their assigned classes.

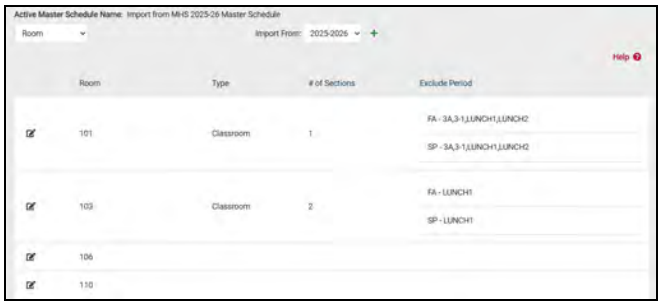
Room Constraints

Room constraints allow you to designate the type associated with each room, the number of sections taught at a time in each room, and to set any period exclusions for times when rooms are “closed”, or unavailable.

Note: Ignore the Import From drop-down and Import Master Schedule Builder Setup ✚ button seen at the top of this screen.

To define or change Room constraints, from within the Master Schedule Builder tab:

1. Select **Room** from the drop-down list. The screen will refresh with a list of all rooms. (Room numbers are predefined in the Maintenance area.)
2. To edit a room, click once on the Edit button to the left of the room number.



3. The room’s row will refresh with editable fields.

4. Make any necessary changes:
   - **Type** allows you to change a room’s designation. Select a single room type from the drop-down list.

     Note: A room can only be defined as one type. The default type is Classroom. Room types are district-defined, and can be found in the Maintenance Module.

Note: If a room is not assigned to a type, the builder will not use it when assigning rooms to sections.

- **# of Sections** are the number of sections that can be taught in this room at the same time. There are times where a gymnasium, for instance, may have multiple classes simultaneously, such as a section of girls phys ed with a section of boys phys ed. Enter the number of simultaneous classes that may be scheduled here. >

  Note: # of Sections is a required numeric field. For most courses, you will simply add a "1" here to indicate that only a single class occurs in this room at a time.

- **ExcludePeriod** allows you to stipulate that this room only be used during certain periods. All defined semesters are available. To select a period during which courses cannot be taught in this room, click once in the checkbox to the left of the period number.

5. Save this room row when you have finished by clicking the Save button to the left of the row. The screen will refresh showing the details for that room in read-only mode among the other room rows.

Period Constraints

Period constraints allow you to control how the MSB allocates seats across periods, and whether any periods should be globally blocked.

Period constraints apply equally to all courses, teachers and rooms.

Use the 'Do not schedule courses in the following periods' section to prevent sections from being scheduled into a particular period. For example, you might have an "extra" period defined at the end of the day that only serves for after-school functions. Or, you might reserve the first period of the day for homeroom. Blocking these periods prevents the builder from scheduling any sections of any courses into this period (or periods).

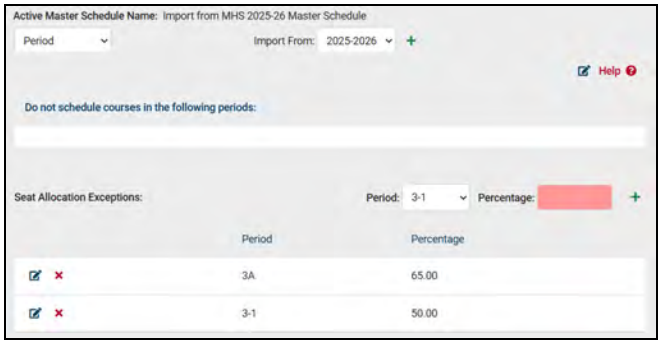
Use the 'Seat Allocation Exceptions' to define the percentage of sections to be scheduled into a particular period. For example, you might wish to have fewer classes scheduled into periods 5, 6, and 7 because of lunch.

Note: You may define multiple period blocks and multiple seat allocation exceptions.

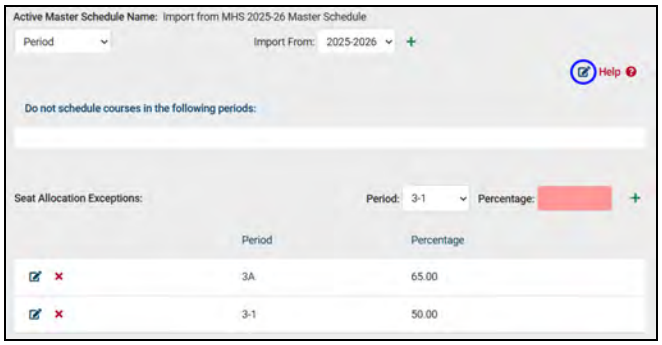
Note: If you define a seat allocation exception for a period that is already blocked, the block will override the exception.

To prevent sections from being scheduled into one or more periods, from within the Master Schedule Builder tab:

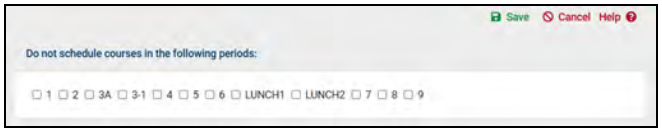
1. Select **Period** from the drop-down list. The screen will refresh with the existing rules (if any) in read-only mode.



2. To edit the 'Do not schedule courses in the following periods' rules, click once on the Edit button to the right of the rule screen.



3. Make the appropriate changes. Check the box(es) of any period(s) to be blocked.



4. Save your work when you are done.

   Note: This Period constraint will apply globally to all courses, teachers and rooms. Individually blocking periods for specific courses, faculty and/or rooms can be controlled in the Course, Faculty and Room constraints areas.

Union Rule Constraints

Union Rule constraints define the general number of periods a teacher can teach in a day, as well as the general number of periods that can be taught in a row. They apply globally to all teachers unless overridden in individual teacher Faculty constraints.

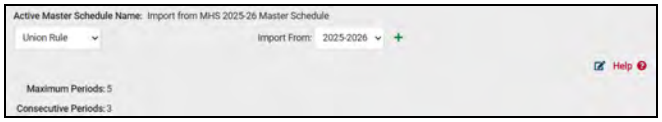
This section allows you to modify the rules as changes are made each year.

These values MUST be completed or the Master Schedule Builder will not run.

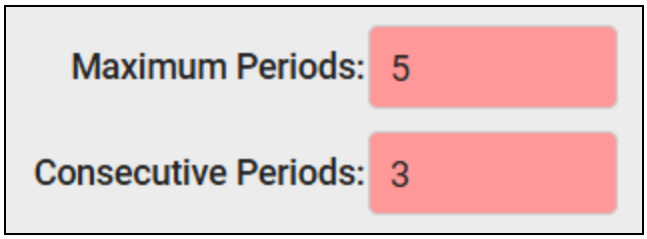
Note: Ignore the Import From drop-down and Import Master Schedule Builder Setup button seen at the top of this screen.

To define or change Union Rule constraints, from within the Master Schedule Builder tab:

1. Select **Union Rule** from the drop-down list. The screen will refresh with the existing rules in read-only mode.
2. To edit the rules, click once on the Edit button to the right of the rule screen.



3. Make the appropriate changes:



- **Maximum Periods** allows you to designate how many periods all faculty members can teach total in a day. This field is numeric and required.

  Note: Most schools set their Maximum Periods at 5.

- **Consecutive Periods** allows you to designate how many periods faculty members can teach in a row. This field is numeric and required.

  Note: Most schools set their Consecutive Periods at 3.

4. Save your work when you are done.

   Note: Union rule constraints for individual faculty can be controlled in the Course and Faculty constraints areas. This will allow you to override the general rules for teachers who fall outside of the "norm," such as tenured teachers, part time teachers, etc.

Running the Master Schedule Builder

Building the Master Schedule

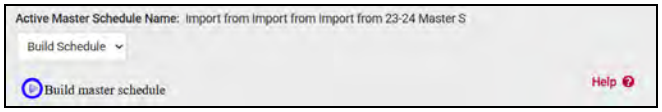
Once all of your course, faculty, room, and union rule constraints have been set, switch to the Build Schedule view. This is where you will initiate the Master Schedule Build. The builder will then create all course sections, assigning periods, teachers and rooms, based on your constraint details.

Your new Master Schedule will contain:

- Sections for all courses that you have **manually**scheduled, whose Course constraints were defined with the "Don't rebuild existing sections" option or which were set as inactive;
- Sections for all courses marked as active in Course constraints based on all other constraints you have specified and course requests;
- Teachers assigned to all course sections based on entered constraints; and
- Rooms assigned to all course sections based on entered constraints.

To create the Master Schedule:

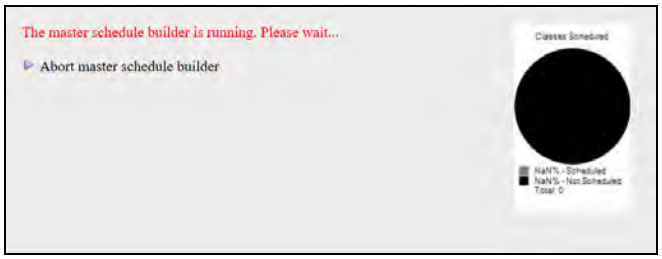
1. In the Master Schedule Builder tab, select Build Schedule from the drop-down list.
2. Click once on the Build master schedule select button. The Master Schedule Builder will run.



3. When the Master Schedule Builder has finished, a confirmation message will appear. This process is very fast, so be sure to watch the screen.

Note: If the Master Schedule Builder detects active courses in the Course constraints list that already have sections in the Master Schedule editor, a message will appear alerting you that the builder will overwrite those sections unless you make the courses inactive in the Course constraints area. This is typically what is seen as soon as the builder finishes, since sections now exist. If this message does *not* appear after the builder has finished, then no sections were created.

Note: As soon as you click the Build master schedule button, a message will appear alerting you that the Master Schedule Builder is running. When it has finished, the message will go away.



Note:To abort the Master Schedule Builder, click once on the Abort button. The task will end immediately.

Note: When you first enter the Build Schedule view, the pie chart is black indicating no students are scheduled.

Hint: Use the Section Load report to analyze the sections created by the Master Schedule Builder.

Hint: Make any changes to constraints and repeat this process until you have an acceptable percentage of class sections in place to meet your student requests (as close to 100% as possible).

Hint: This process has been known to take as little as fractions of a second, or up to as long as 30 minutes, based on the number of sections, complexity of constraints, and number of student requests. If you suspect that the Builder is taking too long and there may be a problem, contact your SchoolTool representative for assistance.

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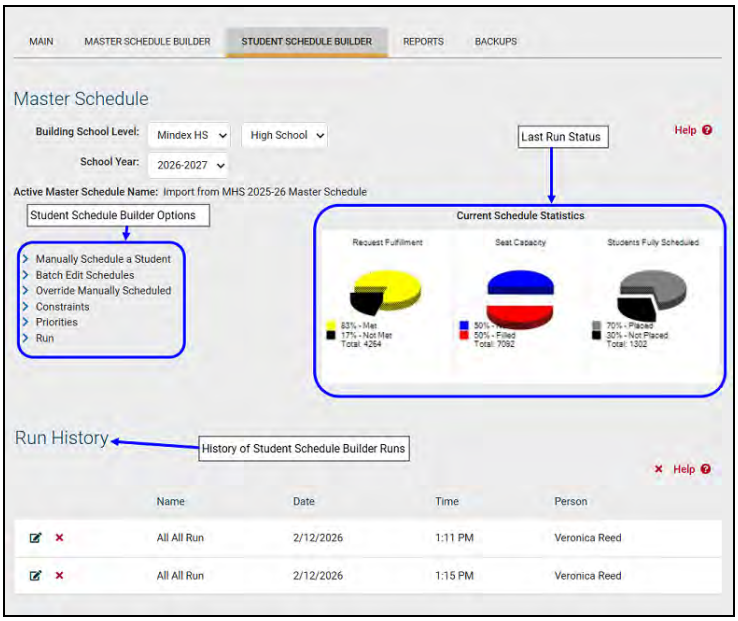
Student Schedule Builder

Once the Master Schedule is in place, students can be loaded into schedules. The Student Schedule Builder will analyze student course requests and place students into sections that will cause the least amount of conflicts.

The Student Schedule Builder is located in the Master Schedule sub-module of the Scheduling module:

1. Open the Scheduling module. The Master Schedule sub-module opens as the default view.
2. Click once on the Student Schedule Builder tab to open the screen.



3. The main screen of the Student Schedule Builder displays multiple pie charts indicating the current status of the student schedule, options for scheduling a student, and options for setting constraints and priorities.
4. Before running the Student Schedule Builder, users can set constraints and priorities in order to achieve the best fit for the largest number of students possible.

   Note: The Student Schedule Builder constraints and priorities are typically only set after the Master Schedule has been built, and reports to verify the Master Schedule have been reviewed.

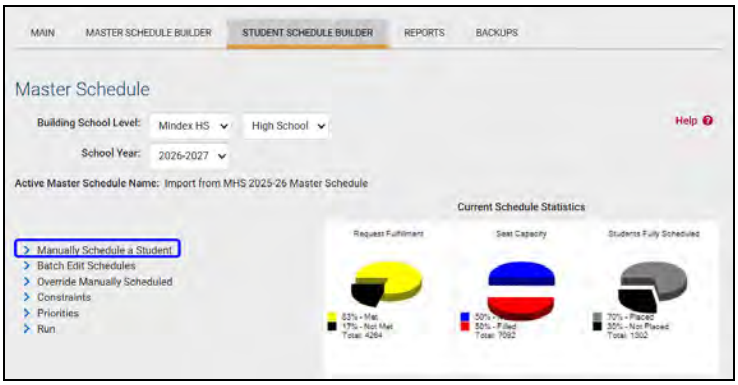
Manually Schedule a Student

The Student Schedule Builder allows you to manually build an individual student's schedule, without using the automatic tools. This allows you to schedule hard-to-

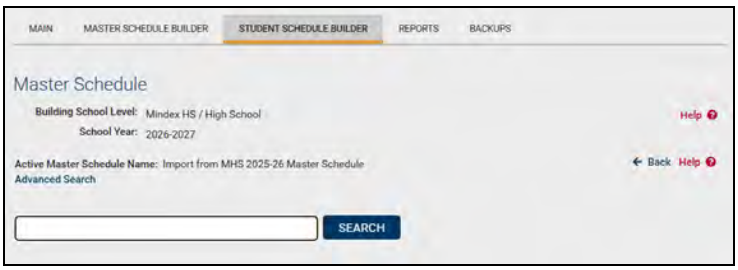
schedule courses (such as required singleton language courses) for a student, or to schedule new students who haven't made selections, but who need to be scheduled before the Student Schedule Builder is run. You can use this process to schedule a single course or the student's full schedule.

Note: It is recommended that you wait to manually schedule students until all Master Schedule sections are in place, and until the majority of students have been loaded. Performing extensive manual scheduling before these tasks are complete may make more work for you later, as manual schedules will impact the Student Schedule Builder's ability to place other students into sections, as well as limit your ability to edit Master Schedule section details such as period placement, semester and cycle day meeting patterns.

1. Click once on the select ❯button to the left of the **Manually Schedule a Student** option. Search options will appear.

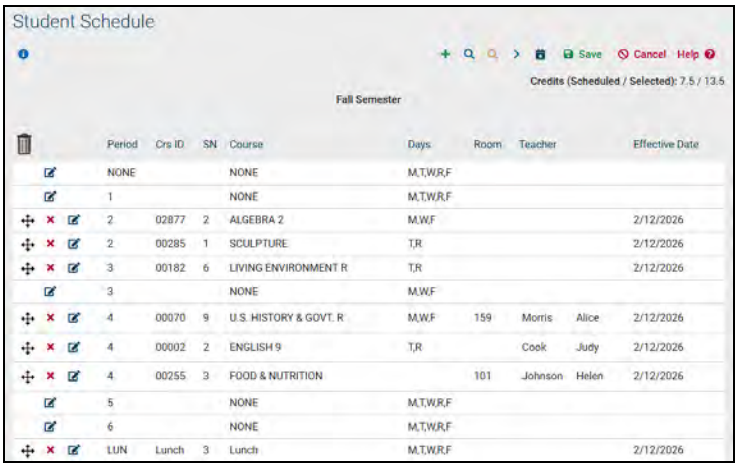


2. Use the basic name search, or the Advanced (Batch Selector) Search options to locate a student to be manually scheduled. If a list results, select the appropriate student from the list.

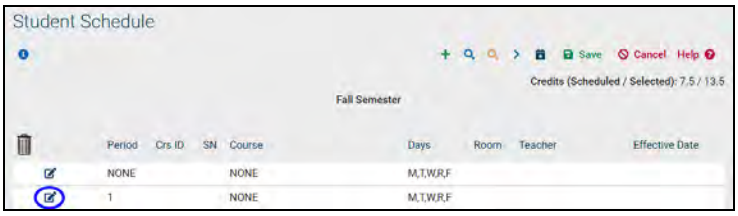


Note: You can only manually schedule one student at a time. If multiple students will need the same schedule, you will have to repeat this process for each one individually, by performing a new search, or by using the Next and Previous buttons to move back and forth between a loaded list of students.

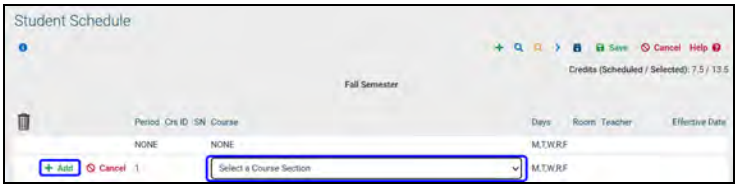
3. When the student's personal information appears, add the appropriate sections to the student's schedule. Refer to the Counseling Moduledocumentation for more information. An abbreviated set of steps is below.



4. Click once on the Edit button to the left of the period where you wish to add a class (or use the drag-and-drop method to move existing courses).



5. When the screen refreshes, a drop-down list of available course sections will appear. Each section listed includes details such as the cycle days this section meets, the number of students currently in the section, the total number of seats, the section number, the room number and the name of the teacher. Select the appropriate class section from the drop-down list and click once on the Add button (green plus) at the left of the period row. This will add the section to this student's schedule.



6. Use the Preview Grid Schedule button if you would like to preview the unsaved changes in a pop-up grid.
7. Click the **Save** button to save your updates to this student's schedule.
8. Repeat for the next class or student.

Note: Using the Manually Schedule a Student option allows you to place a student in a section or two (or all), then use the builder to build the rest of their schedule around the sections you've hand selected. This ensures that the student gets placed into a section of a course which may be otherwise very difficult to schedule.

Note: A student that has been manually scheduled will never have their schedule overwritten by the Student Schedule Builder scheduling tools unless you deliberately choose to override all manual schedules. As a rule, manual scheduling always takes priority over the builder tools.

Note: Users will receive a validation message to indicate when a non-contractable course cannot be added due to a conflicting course section in another semester.

Batch Edit Schedules

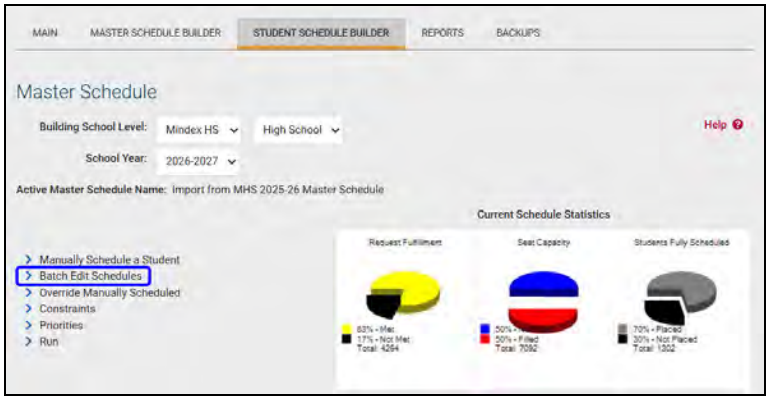
Use Batch Edit Schedules to is where you will add or drop supplemental courses (those without any assigned period), add or drop a section of a course, or withdraw courses for multiple student schedules at one time. This action can be for today's date or a date in the future. This feature utilizes the Batch Selector to locate the groups of students.

All schedule changes follow guidelines that must be followed as if the course is being modified on an individual student's schedule from within Counseling. This includes:

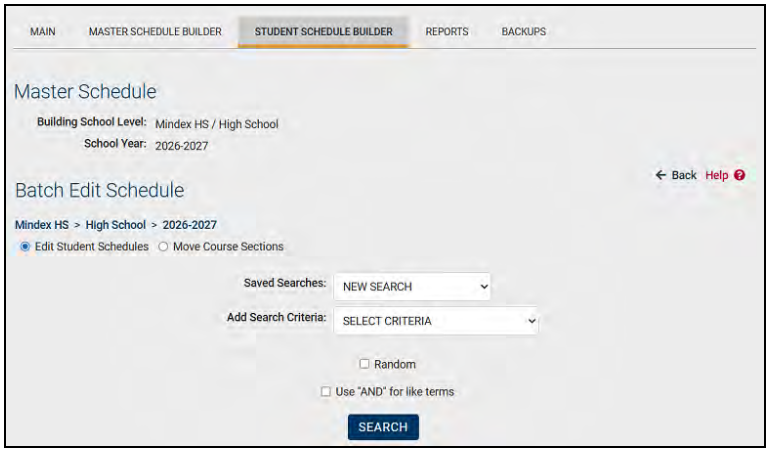
- Enforcement of headcounts, taking into account the scheduling threshold. If there are any headcount violations, then no transactions go through for any student. Headcount limitations are ignored for pending operations.
- If a student fails on any one transaction, for any reason (conflict, etc.) that student will receive none of the listed schedule-change operations.
- For each transaction, the validation process will display a list of students where the transaction failed.

  Note: The Batch Edit Schedule uses a validation process when using the check mark or save buttons, please be patient during this process and wait until it reaches 100%.

- Click once on the select ❯button to the left of the **Batch Edit Schedules**option.

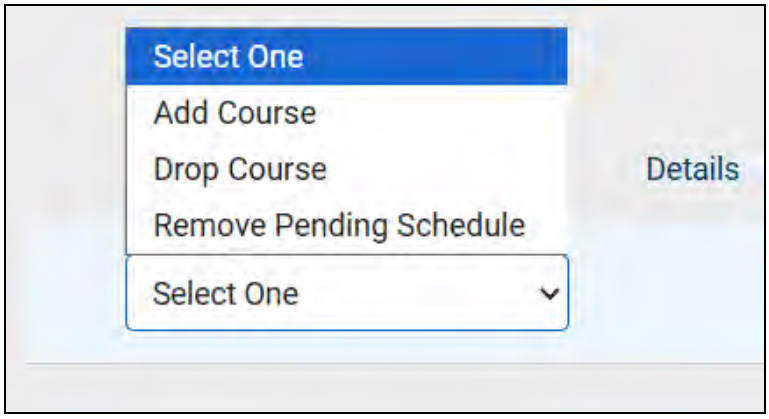


- Using the batch selector, locate the students whose schedule you want to edit.



- Once you have selected a group of students to edit, click Continue. The screen will refresh to show the Batch Edit Schedule screen.

- Select an option from the Action drop-down list to perform on these students.



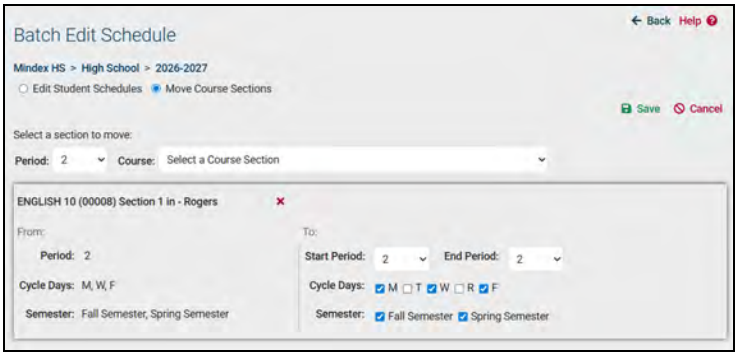
Move Course Sections

1. Use the Move Course Sections area to move sections (and any students assigned to those sections) to different semesters, periods, and/or cycle days.
2. To begin, select the Move Course Sections radio button.

3. The screen will refresh to display drop-downs for Period and Course.

4. Use these drop-downs to locate the first section you wish to move, then click the Add ✚ button.

5. A row will appear for the section that was just added. Use the options to select the new start/end periods, cycle days, and/or semesters for that section.



6. Repeat this process as needed until all section changes have been entered.
7. Once all changes have been entered, click the Save button to begin processing your changes. SchoolTool will attempt to process all schedule changes and will display a confirmation message after all changes are complete (or, if the changes cannot be processed, will provide an indication of any issues or conflicts).
    - Possible conflicts include the following:
        - Attendance data exists for a section (one or more sections cannot be moved because attendance data exists for one or more students in those sections)
        - Marking period or progress report grading data exists for a section (marking period or progress report grades have been submitted for one or more students in those sections)
        - Grade book assignments exist for a section (grade book assignments have been created for that section)
        - Student schedule conflicts exist for a section (one or more of the moves would result in schedule conflicts for students in these sections)

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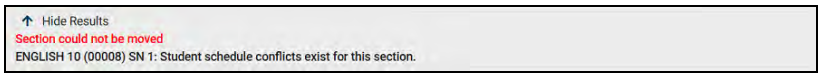
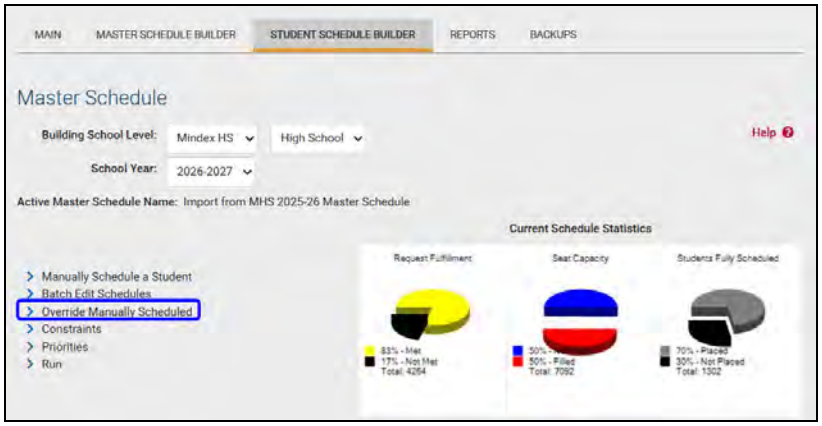


Override Manually Scheduled

The Override Manually Scheduled option is used to remove all manual schedule edits for all students.



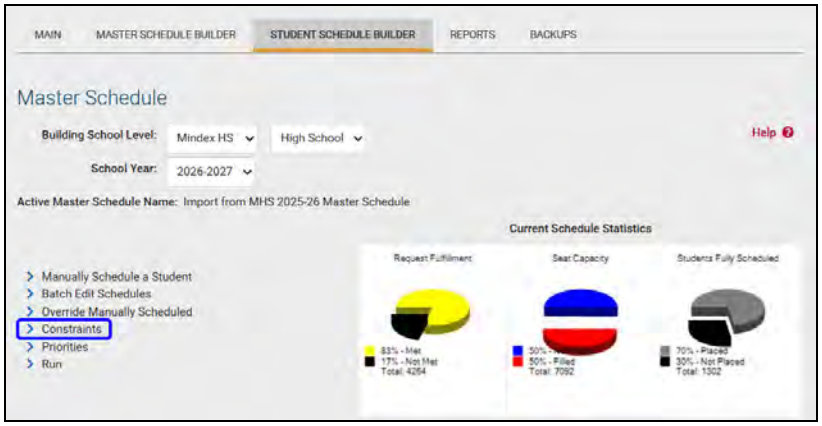
This option creates a new run and assigns all manually scheduled courses to that run. This run allows the SSB to function with the manually scheduled students as if they had been scheduled by a normal schedule builder run. These student schedules are no longer considered manually scheduled, and will be included in all future SSB runs.

Once this action is confirmed, a run of the manually scheduled students will be added to the run history.

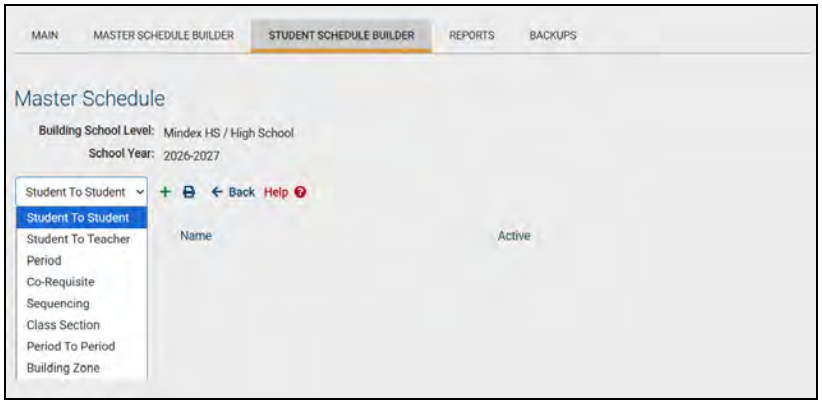
Constraints

Constraints, like the ones in the Master Schedule Builder, are scheduling limitations, or factors, which help control the way the student schedules are loaded. Constraints are school-year specific, and must be created from scratch each year, so that they reflect actual master schedule sections. There are currently no rollover features in this area.

Constraints are not required, and each building may choose to use whichever constraints are relevant for the way they load students into schedules.



From within the Student Schedule Builder screen, click once on **Constraints** from the list at the left. The screen will refresh with a drop-down list of constraint options.



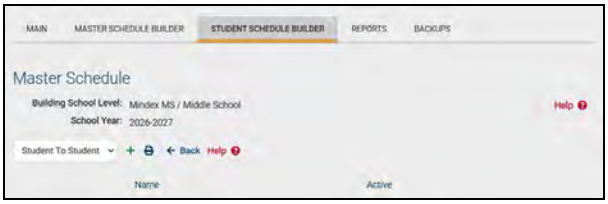
There are eight (8) different types of constraints in the Schedule Builder:

- **Student to Student**

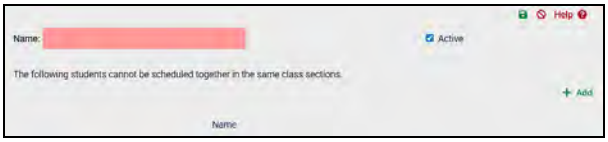
  This constraint allows us to tell the scheduler not to schedule one student with another specific student or students. A number of students can be listed here, to keep them all apart from each other. An example might be

siblings who fight, or a group of students who cause trouble. To use this:

1. Select Student to Student from the list of constraints.
2. Click once on the green Add Constraint ➕button to the right of the drop-down list. The screen will refresh with a required, free-text entry field where the name of the student combination can be entered.



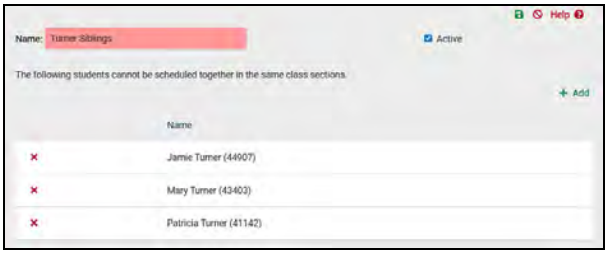
3. In the **Name** field, type a description of this constraint and click on the green Add ➕button to the right of the lower section.



Hint: Use a name that is descriptive enough to recognize when you come back later, like “The Berkshire kids” or “Bobby Brown and Jennifer Tanaka.”

4. The screen will refresh with Batch Selector search options on the bottom portion of the screen. Use Saved Searches and/or Batch Selector search options to locate the first student. You can also use this to find a group of students, such as siblings who should be separated. Select the student(s) from the list by deselecting the entire list and checking the box(es) to the left of the student name(s).

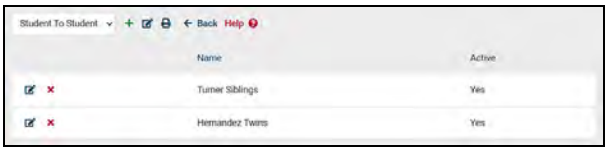
5. After selecting students click once on the Continue button. You will be returned to the main screen where the student name will appear in a list.



Note: Continue to add students until you have selected all students who cannot be scheduled together.

Note: The Active flag allows you to deactivate this constraint without deleting it.

6. When you have finished building the student combination, click once on the Save Constraint button in the upper right corner. You will be returned to the main constraint screen.



Note: Use the Edit and Delete buttons to change or remove this constraint.

Note: The Student Schedule Builder will now ensure that these students are not scheduled in the same sections. This means that if both students requested a singleton, only one student will be scheduled into the section.

Note: If three or more students are selected for this constraint, then none of the students can be in the same section. So, if all of the students listed have requested a course that ends up to be a doubleton or tripleton, and there are not enough sections to allow each student to be in his/her own section, one or more students will not be placed.

Note: Student to student constraints can be manually overwritten on individual student schedules in the Counseling module. This allows two students who both requested a singleton to get that course, even though they will be kept apart for all other courses by the builder constraint.

Student-to-Student Report

Master Schedule Student-to-Student Constraints 5/19/06

High School : High School : 2006-2007

The grouped students cannot be scheduled together in the same class sections.

Constraint Name	Student Name	Grade	Active?
Jenn and Adam			**Yes**
	ASHLAND, Jennifer	12	
	NICHOLSON, Adam	10	
The Dangerfield Quints			**Yes**
	DANGERFIELD, Brittany	11	
	DANGERFIELD, Edward	11	
	DANGERFIELD, Kathryn	11	
	DANGERFIELD, Maria	11	
	DANGERFIELD, Steven	11	

- **Student to Teacher**

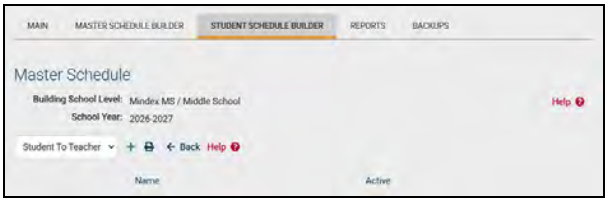
This constraint works much the same way the Student to Student constraint works, except that this prevents a specific student or students from being scheduled in a specific faculty's classes.

This might be used when a teacher is also the parent of a student or students in this school, and district or school policy prevents them from teaching their own children, or when there is a political or legal situation between a student and a teacher.

This constraint can also be used to ensure that a student is scheduled into one particular teacher's courses. By creating constraints with all other teachers who teach sections of the course or are in this department, you can force the Builder tools to place the student into only the section for the remaining teacher.

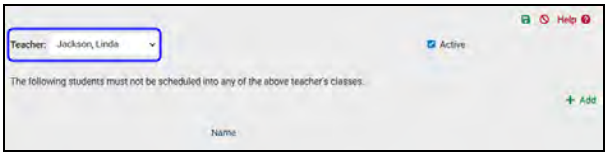
To add Student to Teacher constraints:

1. Select Student to Teacher from the list of constraints.



2. Click once on the green Add Constraint ➕button to the right of the drop-down list. The screen will refresh with a drop-down list where you can select the name of a teacher from a list of all faculty in the building.

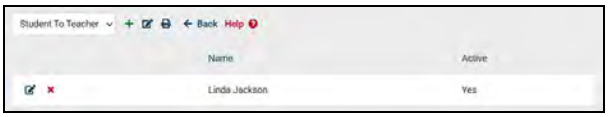
3. Select a Teacher from the drop-down list.



4. Next, define the student or students who should *not* be scheduled with this teacher. Click once on the green Add ➕button to the right of the lower section, under the message "The following students must not be scheduled into any of the above teacher's classes." The screen will refresh with searching options.

5. Use the Saved Searches and/or Batch Selector search options to locate the first student. This can also be used to locate a group of students, such as siblings who are related to the teacher and must all be kept out of his/her classes. Select the student(s) from the list by deselecting the entire list and checking the box (es) to the left of the student name(s).
6. Click once on the Continue button. You will be returned to the main screen where the student name(s) will appear in a list.

7. Continue to add students until you have listed all of the students who cannot be scheduled in this teacher's classes.
8. When you have finished building the student-teacher combination, click once on the Save Constraint 💾button in the upper right corner. You will be returned to the main constraint screen.



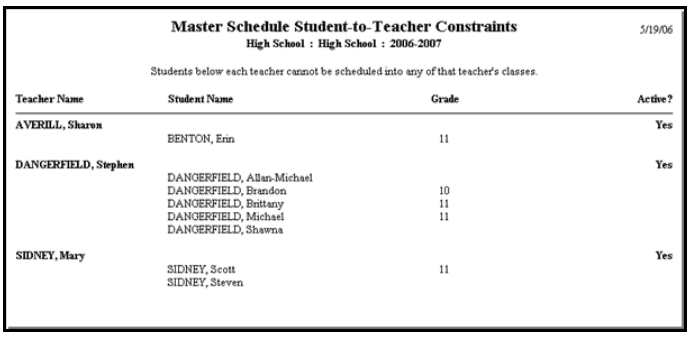
Note: The Active flag allows you to “turn off” this constraint later, if necessary.

Note: Use the Edit and Delete buttons to change or remove this constraint.

Note: The Student Schedule Builder will now ensure that these students are not scheduled in any of this teacher’s sections.

Note: Student to teacher constraints can be manually overwritten on individual student schedules in the Counseling module. This allows a student or students to take a course that only this faculty teaches, such as a special singleton like Advanced Computers.

Student-to-Teacher Report



Master Schedule Student-to-Teacher Constraints 5/19/06

High School : High School : 2006-2007

Students below each teacher cannot be scheduled into any of that teacher's classes.

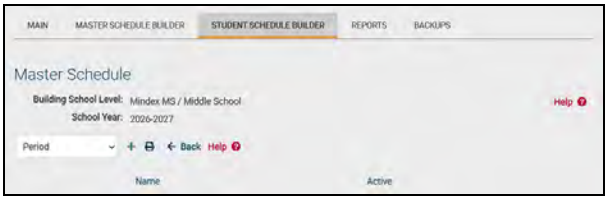
Teacher Name	Student Name	Grade	Active?
AVERILL, Sharon			**Yes**
	BENTON, Erin	11	
DANGERFIELD, Stephen			**Yes**
	DANGERFIELD, Allan-Michael		
	DANGERFIELD, Brandon	10	
	DANGERFIELD, Brittany	11	
	DANGERFIELD, Michael	11	
	DANGERFIELD, Shawna		
SIDNEY, Mary			**Yes**
	SIDNEY, Scott	11	
	SIDNEY, Steven		

- **Period**

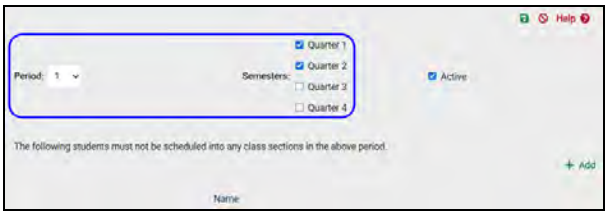
The period constraint allows us to tell the scheduling tool that a specific student or set of students should not be scheduled for certain periods of the day, in specified semesters. This leaves those students open for special programming.

To create a period constraint:

1. Select Period from the list of constraints.
2. Click once on the green Add Constraint button to the right of the drop-down list. The screen will refresh with options where you can define the student-specific period restrictions.

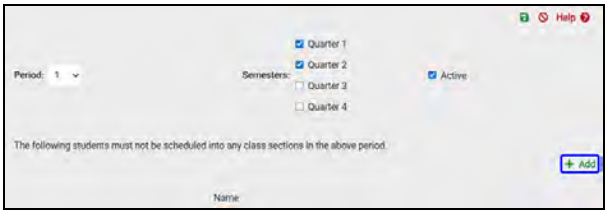


3. Select a Period from the drop-down list and check the appropriate semester(s). This is the period we are blocking for this student or students.



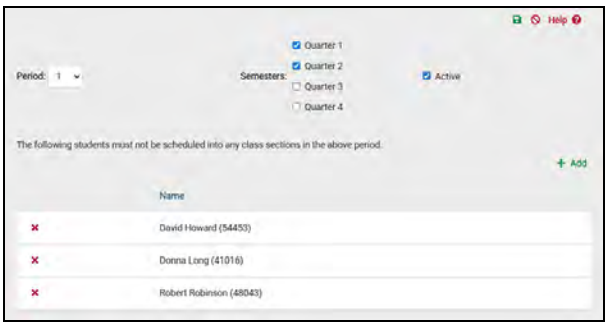
Note: If a student must be blocked for multiple periods in a row in a semester or semesters, you will need to build individual constraint records for each period. Continue, then repeat, the remaining steps to do so.

4. Next, define the student(s) who is blocked from attending classes during this period. Click once on the green Add ➕button to the right of the lower section, under the message "The following students must not be scheduled into class section in the above period."



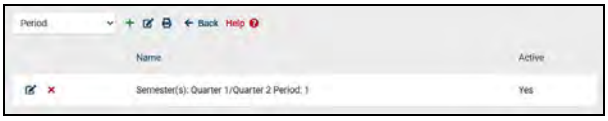
5. The screen will refresh with searching options. Use the Saved Searches and/or Batch Selector search options to locate the first student. You can also use this search to locate a group of students, such as all 6thgrade AP students, who need to have a particular period open for some specific assembly throughout the semester or year.

6. Select the desired students and click once on the Continue button. You will be returned to the main screen where the student name(s) will appear in a list.



Note: The Active flag allows you to "turn off" this constraint later, if restricting this student(s) from this period is no longer necessary.

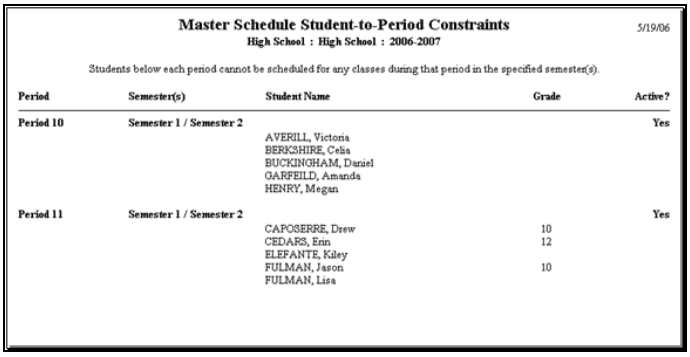
7. Continue adding students until you have listed all of the students who cannot be scheduled during this period.
8. When you have finished building the list, click once on the Save Constraint button in the upper right corner. You will be returned to the main constraint screen.



9. Continue adding constraints until you have added all student-blocked period combinations.

Note: Use the Edit and Delete buttons to change or remove this constraint.

Student-to-Period Report



Master Schedule Student-to-Period Constraints 5/19/06

High School : High School : 2006-2007

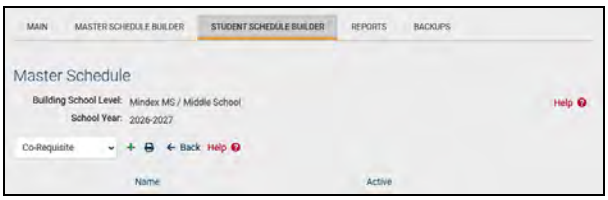
Students below each period cannot be scheduled for any classes during that period in the specified semester(s).

Period	Semester(s)	Student Name	Grade	Active?
Period 10	**Semester 1 / Semester 2**			**Yes**
		AVERILL, Victoria		
		BERKSHIRE, Celia		
		BUCKINGHAM, Daniel		
		GARFEILD, Amanda		
		HENRY, Megan		
Period 11	**Semester 1 / Semester 2**			**Yes**
		CAPOSERRE, Drew	10	
		CEDARS, Erin	12	
		ELEFANTE, Kiley		
		FULMAN, Jason	10	
		FULMAN, Lisa		

- ## Co-Requisite

Use this to prevent two courses (for example, Economics (ECO) and Participation in Gov't (PIG)) from being scheduled together in the same year or semester, **or** to make sure two courses that piggy-back each other are kept together in the same year or semester. This constraint may be more appropriate for high school than for middle school, so use judgment when creating co-requisite constraints.

1. Select Co-Requisite from the list of constraints.



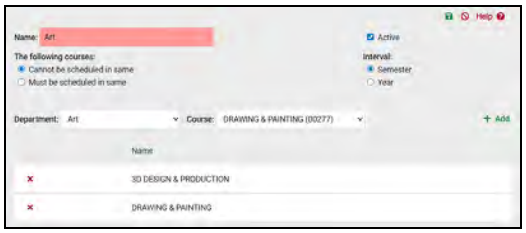
2. Click once on the green Add Constraint ➕button to the right of the drop-down list. The screen will refresh with options where you can define co-requisite restrictions.

3. Enter the Co-Requisite details:
   - **Name**: This is the name of this co-requisite. It is required, and can be anything that will identify this co-requisite to someone looking at it later.
   - **Active**: Un-checking this disables the constraint, without having to delete it.

- **The following courses**: Select one of the two options, “Cannot be scheduled in same” or “Must be scheduled in same” to indicate what type of co-requisite constraint this is.
- **Interval**: Select one of the two options “Semester” or “Year” to coincide with the previous option.

  Note:The two sets of radio buttons described here are designed to work in conjunction. Selecting “Cannot be scheduled in same,” for instance, makes no sense without “Semester” or “Year” selected as well.

4. Add Courses to the list:
   A. Select a Department and corresponding Course from the drop-down lists. To add this course to the list, click once on the green Add button to the right of the lower section. The screen will refresh with the course Name in a list below.



   B. Continue selecting and adding courses to this list as needed.
5. When you have finished building the co-requisite list, click once on the Save Constraint button in the upper right corner. You will be returned to the main constraint screen.

Note: Use the Edit and Delete buttons to change or remove this constraint.

Co-Requisite Report

Master Schedule Co-Requisite Constraints 5/8/06

High School : High School : 2006-2007

Co-Requisite Name	Department	Course
Ceramics - The following courses cannot be scheduled in the same semester		
	Art	CERAMICS 1
	Art	CERAMICS 2
Drawing and Painting - The following courses cannot be scheduled in the same semester		
	Art	DRAWING & PAINTING 1
	Art	DRAWING & PAINTING 2
ECOPIG - The following courses must be scheduled in the same year		
	Social Studies	ECONOMICS REGENTS
	Social Studies	PART. IN GOVERNMENT

- **Sequencing**

  Use this constraint to make sure that a student getting a particular section of a course will also get a corresponding section of another course. For example, you can create course blocks such as technology blocks or use it to make sure that a student who gets a particular section of a science lecture gets a corresponding lab.

  Examples:

  - Science Lecture/Labs Example: Anyone placed in AP BIO Lecture Section 1 (period 1) will automatically get placed in AP BIO LAB Section 1 (period 2).
  - Tech Block Example: Anyone Placed in Technology Section 1 will automatically get placed in H/C Section 1, Art Section 1 and Music Section 1.

    Note: It is not possible to sequence two sections of the same course. This constraint only works with different course numbers.

    Note: You can sequence up to five different course sections. For example, in the Tech Block example above, you could sequence a section of Art to a section of H/C to a section of Tech to a section of Music to a section of Computers, but if you needed to add a 6th sequence for Health, the Student Schedule Builder will not build the sequence.

  There are several ways of entering sequencing constraints:

  - Add a single sequencing constraint
  - Add sequencing constraints for all linked courses at the same time
  - Add sequencing constraints for all sections of two courses at the

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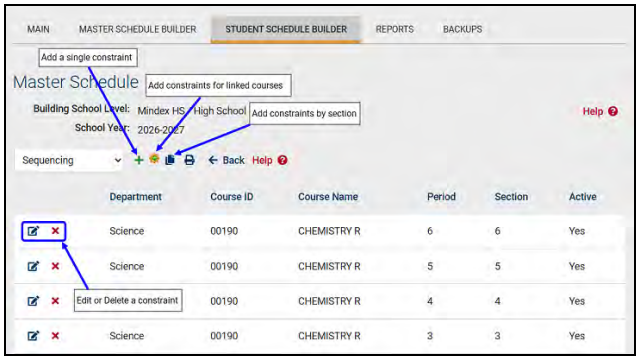
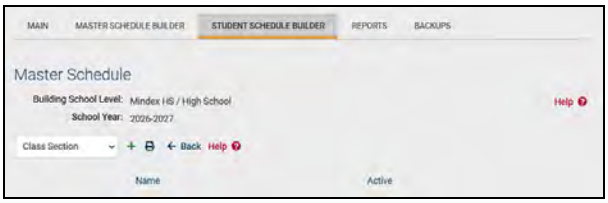
same time



- **Class Section**

The Class Section constraint allows us to tell the scheduler not to schedule specific sections of courses if another specific course section is scheduled. For instance, if a student was allowed to **either** take Ceramics **or** Sculpture, but not both, we could use this constraint. To use the Class Section constraint:

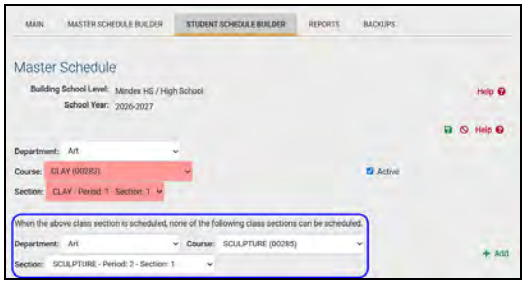
1. Select **Class Section** from the constraints drop-down.



2. Select the primary course:
   A. Select a Department from the drop-down list.
   B. Select a Course in the Department from the Course drop-down list.
   C. Select a Section of the Course from the Section drop-down list.

3. Select a course under “When the above class section is scheduled, **None**of the following class sections can be scheduled”:

A. Select a Department from the drop-down list.
B. Select a Course from the drop-down list.
C. Select a Section of the course from the drop-down list.



4. Click the Add button to add the course section to the list.

5. Continue to add courses that should not be scheduled with the first-listed course section.
6. Click the Save Constraint button to save this constraint.

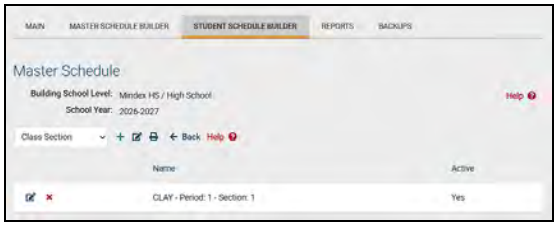
Note: Sometimes multiple Class Section constraints will be needed to appropriately constrain a class relationship. For instance, if students are only allowed to take one, but not both, of Sculpture and Ceramics, we would need the constraint:

- If taking Sculpture section 1, cannot take Ceramics section 1 or section 2

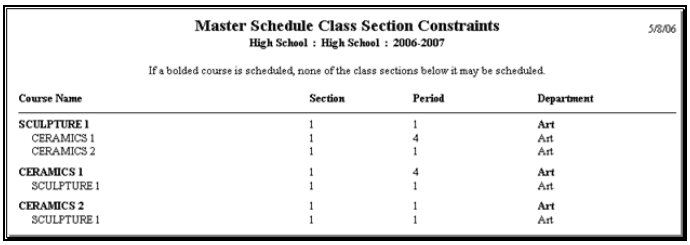
We would also need constraints for the following:

- If taking Ceramics section 1, cannot take Sculpture section 1
- If taking Ceramics section 2, cannot take Sculpture section

1



Class Section Report



Master Schedule Class Section Constraints
High School : High School : 2006-2007

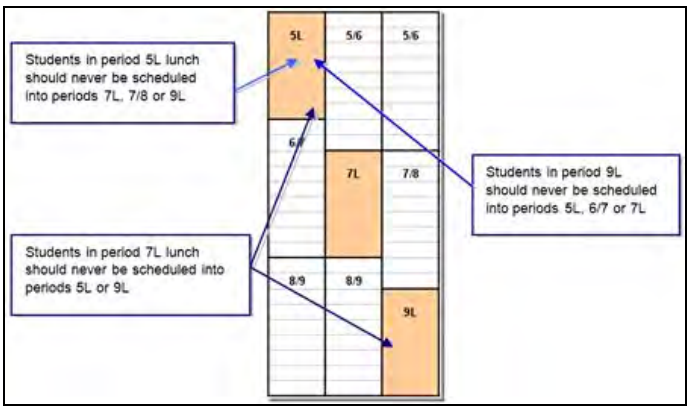
5/8/06

If a bolded course is scheduled, none of the class sections below it may be scheduled.

Course Name	Section	Period	Department
SCULPTURE 1	1	1	**Art**
CERAMICS 1	1	4	Art
CERAMICS 2	1	1	Art
CERAMICS 1	1	4	**Art**
SCULPTURE 1	1	1	Art
CERAMICS 2	1	1	**Art**
SCULPTURE 1	1	1	Art

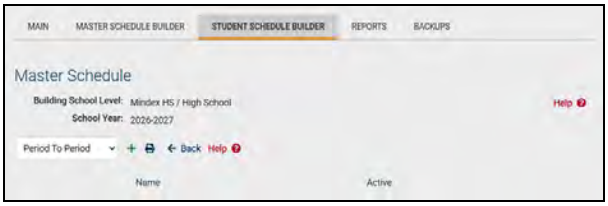
- **Period to Period**

The Period to Period constraint allows us to tell the scheduler not to schedule specific sections of courses if a student is scheduled into a specific course in a specific period. This is often used for modular lunches, where the lunch period(s) is shorter in duration than the course periods that come before and after it. Using the Period to Period constraint prevents a student who is scheduled into a specific section of lunch in one "lunch/course track" from getting scheduled into sections of courses that are part of a different lunch/course track. The following table illustrates this scenario:



To add Period to Period constraints:

1. Select **Period to Period** from the constraints drop-down.



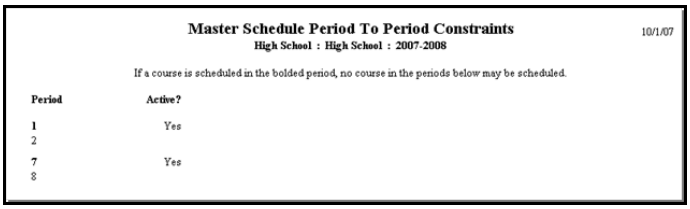
2. Click once on the green Add Constraint button to the right of the drop-down list. The screen will refresh with options where you can define the period-to-period restrictions.
3. Select a period from the upper-most **Period** drop-down list. This is a period that denotes a "track."

4. Select a period from the lower **Period** drop-down list, under the "When a class is scheduled that is in the above period, no classes in the following periods may be scheduled in the same semester" message. This is a period from an alternate track that the student should not be scheduled into.
5. Click the Add button to the right of the lower section to add the selected period to the list.
6. Continue to add periods that should not be scheduled with the first-listed period.

7. When you have finished building the period-to-period constraint, click once on the Save Constraint button in the upper right corner. You will be returned to the main constraint screen.

Note: Use the Edit and Delete buttons to change or remove this constraint.

Period-to-Period Report



Master Schedule Period To Period Constraints 10/1/07

High School : High School : 2007-2008

If a course is scheduled in the bolded period, no course in the periods below may be scheduled.

Period	Active?
1	Yes
2	
7	Yes
8	

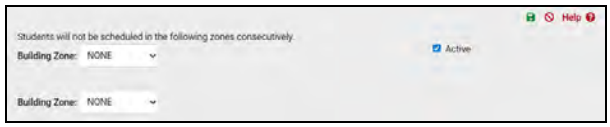
- **Building Zone**

The Building Zone constraint allows us to tell the scheduler not to schedule students into consecutive courses that are in different building zones. This was designed to help minimize between-period commutes for students traveling from class to class in a geographically large building.

To add Building Zone constraints:

1. Select Building Zone from the constraints drop-down.

2. Click once on the green Add Constraint button to the right of the drop-down list. The screen will refresh with options where you can define the building zone restrictions.



3. Using the Building Zone drop-downs, choose the zones that should not be scheduled consecutively.
4. Save this zone pair.
5. Repeat these steps for all zone combinations that you are trying to prevent.

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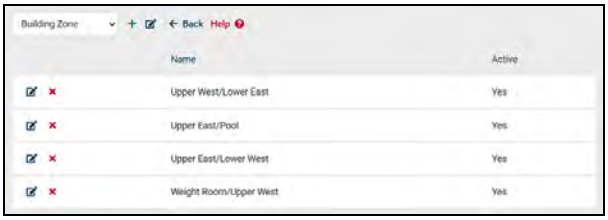
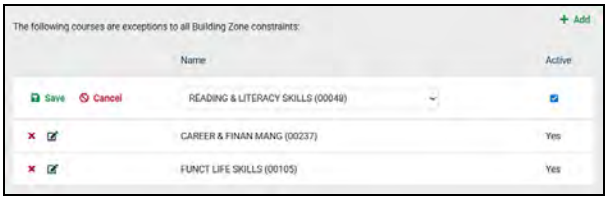


6. Below this list, use the green Add button to the right of the phrase "The following courses are exceptions to all Building Zone constraints" to add any exceptions.



7. Select the first course from the Name drop-down.
8. Save this course to the exception list.
9. Repeat these for all courses that are exceptions.

   Note: Building Zones must be defined and assigned to room numbers in **Maintenance > District > Building** before this constraint can be setup.

   Note: The Building Zone constraint does not have a report.

Note: These constraints are only used by the Student Schedule Builder during the automatic scheduling process. After the schedule is locked, constraints can be overridden and changes can be made to individual student schedules in the Counseling module.

Additional Information

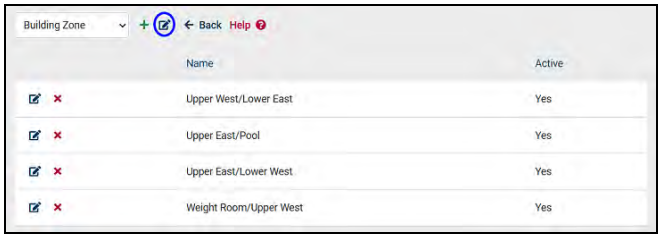
Batch Activating Constraints

At the top of each constraint's screen, the Batch Activate/Inactivate button will allow you to select multiple constraints at once that you would like to either activate or deactivate. This allows the scheduler to quickly enable and disable multiple constraints, without deleting them or having to edit and save each one.

Note: This button only appears if constraints exist.

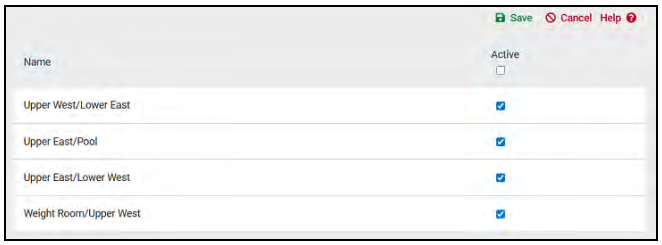
To Batch Activate or Inactivate constraints:

1. Select the constraint from the drop-down that you would like to work with.
2. Click once on the Batch Activate/Inactivate button



Note: If the selected constraint category contains no data, the Batch Activate/Inactivate button will not be displayed.

3. Use the checkboxes along the right-hand side of each constraint to activate or deactivate the constraint, or use the top-most checkbox to select all constraints.

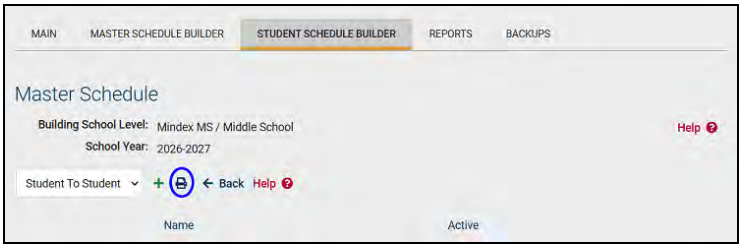


4. Click the Save button to save your changes.
5. All of the constraints that were checked are now active and all others are inactive and will be ignored by the Student Schedule Builder tools.

Constraint Reports

At the top of most of the constraint screens, a printer icon appears which allows the user to create a report listing all of the selected constraint's details.

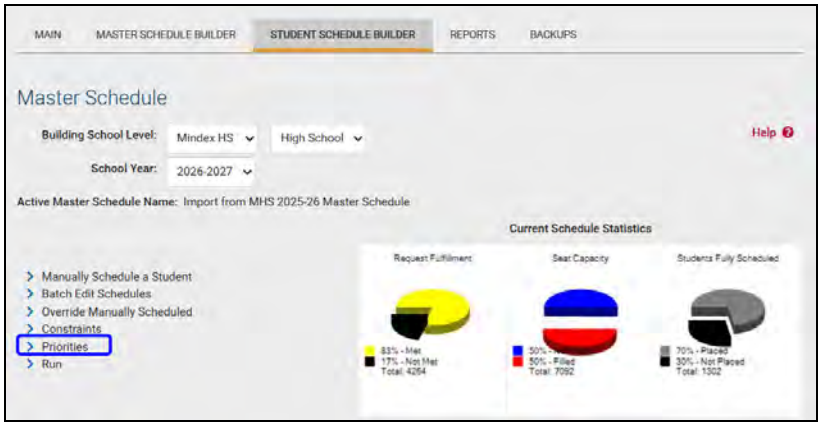
It is recommended that you print a constraint report for each constraint that is in use prior to locking the master schedule. This allows you to retain a record of your constraint setup for next year.



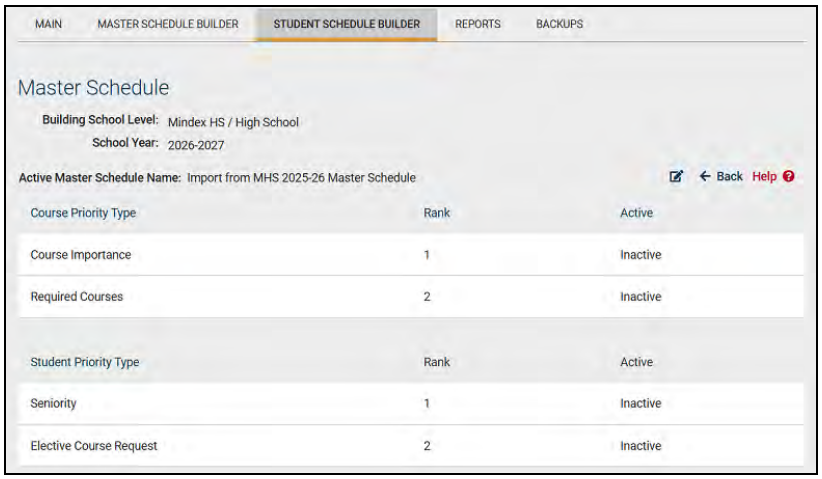
A different report will print for each constraint, based on the constraint that has been chosen from the drop-down. Refer to the documentation for each specific constraint for samples of these reports.

Priorities

The Priorities screen gives users control over whether or not specific priorities are active and the order in which priorities are applied to the Student Schedule Builder (SSB) logic.



This screen allows you to set priorities for courses and for students.



Course Priorities:

Course Priorities determine the order in which courses are ranked when the base logic for course grouping is applied. Available priorities include Course Importance and Required Courses. When one or more of these priorities are active, these priorities will be used to group courses *before* the base logic for course grouping is applied. If multiple course priorities are active, these priorities will be applied based on priority rank order.

- When the Course Importance priority is active, courses are sorted by course importance before the basic SSB logic for course grouping is applied. Courses with higher course importance will be ranked higher and will therefore be scheduled before courses with lower importance.
- When the Required Courses priority is active, all required courses will be grouped separately from non-required (elective) courses and the base SSB logic for course grouping will be applied to each group separately, starting with the required courses group.

Student Priorities

Student Priorities determine how students are placed in course sections by the Student Schedule Builder. Available priorities are Seniority and Elective Course Request. When one or more of these priorities is active, they will fill course sections before the base logic is applied.

- When the Seniority priority is active, upperclassmen will receive preference by the Student Schedule Builder over underclassmen. For example, if a senior and a freshman have both selected a course with only one seat available, the senior would be placed in the course.
- When the Elective Course Request is active, the Student Schedule Builder will prioritize a student's elective course selections by the priority (High, Medium or Low) chosen.

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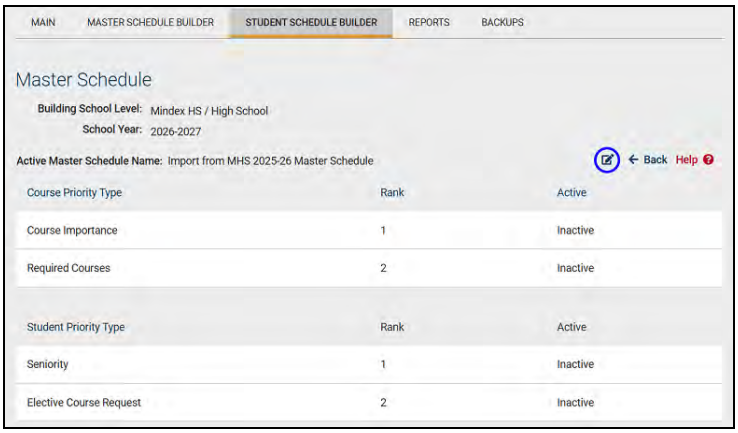
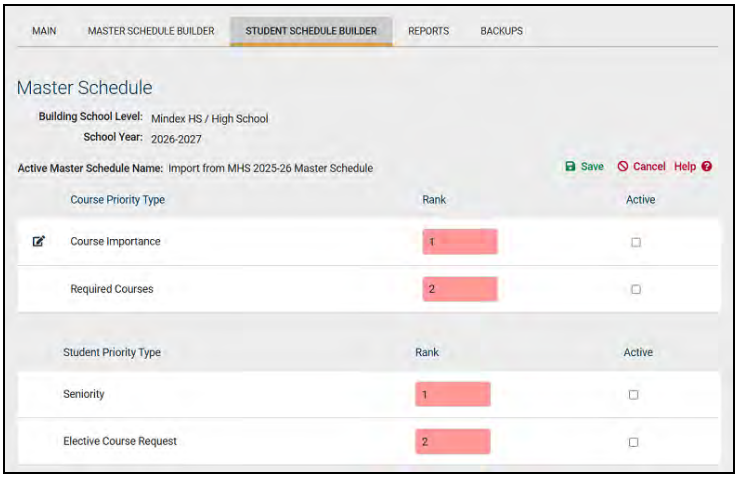
Editing Priorities

1. Click once on the Edit button in the upper right corner of the priorities area.
2. The screen will refresh with editable fields for each priority option.



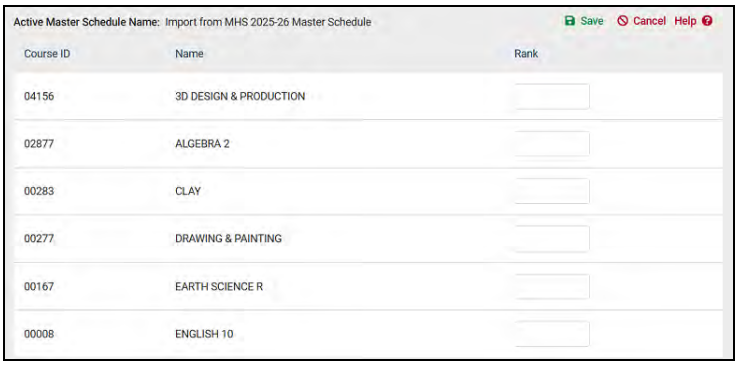
3. Change the Rank and Active status of any priority by clicking once in the Active checkbox for that option.



- If a priority is active, it is used when the Student Schedule Builder is run.
- If a priority is inactive, it is ignored when the Student Schedule Builder is run.

Editing Course Importance

1. To edit course importance values, and rank individual, hard-to-schedule courses, click the Edit button to the left of the Course Importance row. The screen will refresh with editable Rank fields for every course in the course catalog.



Note: You are not required to rank all courses. You can simply rank one or two courses to ensure they are scheduled first, and leave the others blank.

Note: If one or more courses are ranked as the same number priority (i.e., three courses are given priority #1), then the builder will treat them all as equal priority and other Student Schedule Builder constraints and priorities will be used to determine the scheduling order. For example, if three core classes, English, Chemistry and Calculus, are all ranked as #1, but Calculus is a singleton and Chemistry is a doubleton, Calculus may be scheduled first, followed by Chemistry, followed by English, based on the other priorities and the logic of the Builder.

2. When you have finished updating course importance ranks, click once on the Save button to return to the list of priorities.
3. When you have finished updating all priorities, click once on the Save button to save this information and return to a read-only view of the priorities list.
4. You are now ready to run the Student Schedule Builder.

Running the Student Schedule Builder

Once you have finished manually scheduling any students who require hand-built schedules, and you have configured your Student Schedule Builder Constraints and Priorities, you are ready to run the builder and load students into the master schedule.

SchoolTool allows users to run the builder multiple times, incrementally, saving a Run History to refer back to later.

Users can run all grades and courses at once, or run grade by grade, course by course, or even run specific students, teams or courses individually. However, the Student Schedule Builder works best when everything is loaded at the same time.

Users can also save copies of the schedule which saves the student loads. You can then practice loading different versions of the Master Schedule and compare which is best. Refer to the Backups Tab for more information.

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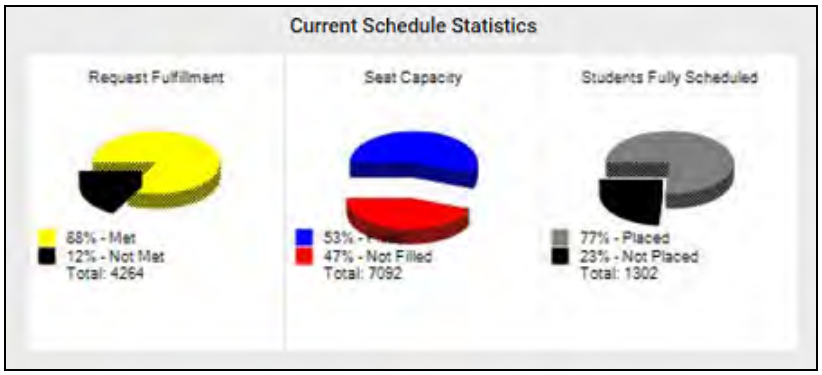
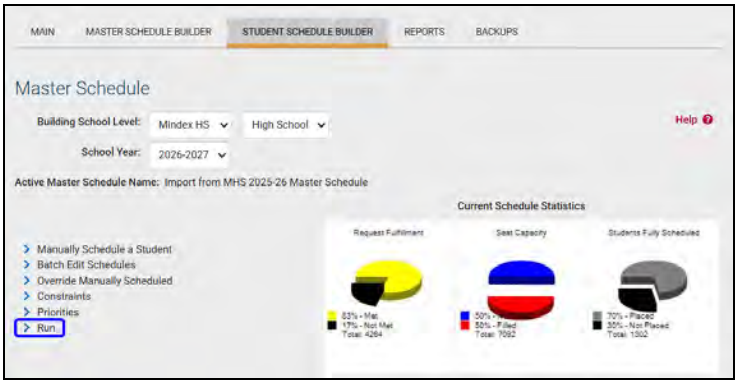


Note: If the **Request Fulfillment** and/or **Students Fully Scheduled** pie charts show a percentage of students who are placed BEFORE you run the builder, this indicates that you have students with no course selections. If a student has no course selections, then they are, in theory, fully scheduled with all "requests" met. So, no selections = perfect placement as far as the builder is concerned.

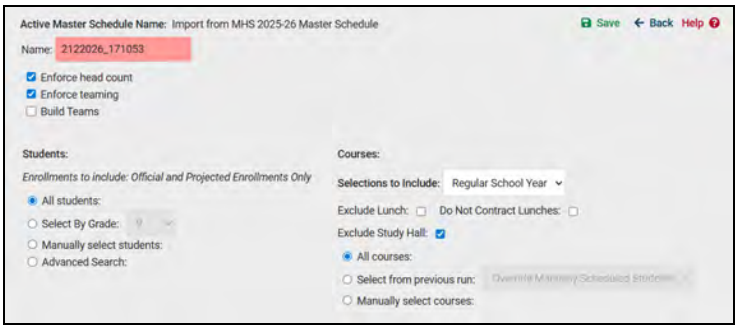
Note: If the **Seat Capacity** and/or **Students Fully Scheduled** pie charts show a percentage of students who are placed BEFORE you run the builder (but the Request Fulfillment pie chart does not), this indicates that you have students who have been manually scheduled. Use reports (see the *Master Schedule Reports*section) to analyze your Master Schedule and Course Selections to find and resolve students who do not have any course selections.

To perform an incremental run (or "load") with the Student Schedule Builder:

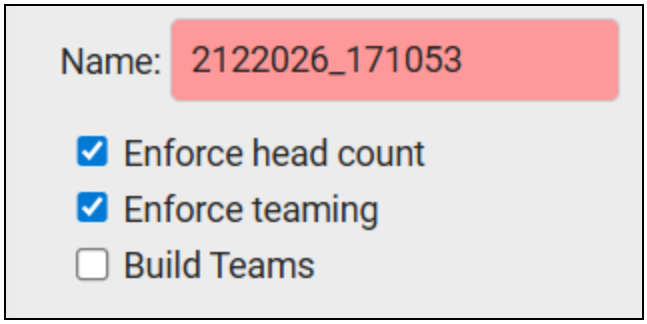
1. From the Student Schedule Builder screen, click once on the Select ❯button for **Run**. The screen will refresh with Master Schedule options.



2. Add the **Name** of the run.
3. The default name includes today's today and the exact time (hour, minute, second) that you generate the report. You can replace that with whatever is most meaningful for you.



4. Set run options:



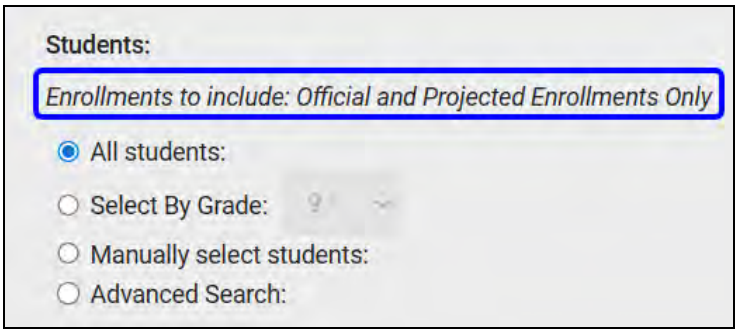
   A. Enforce head count checkbox – enforces that courses can only be scheduled up to the max head count; no over scheduling is allowed.
   B. Enforce teaming checkbox – enforces that only students in the assigned teams will be scheduled; will not allow students on other teams to be scheduled into a section designated for one team.

      Note: If you are not using teaming, this checkbox is ignored.

   C. Build teams checkbox – allows teams to be built on the fly; the scheduler essentially puts students in the team that allows them to have the best/most complete schedule based on their elective requests.

      Note: If a student has already been assigned to a team in the Teaming Maintenance area, this option will be ignored for that student.

5. Select Students: these options allow users to do a run for a student or group of students, such as those in a particular building. The screen will indicate which students will be included based on their enrollment category (this option is set in **Maintenance > Scheduling > Yearly Building School Level Options**).



A. Select **All** Students (the default) to run the student scheduler for the whole building
B. Select students **By Grade** using the drop-down menu of available grades.

   Note: if you are running the builder before the schedule year, this will reflect a group of projected grades; if you are running the builder during the active schedule year (after July 1st), these will be the actual grades (unless your school is using a schedule offset and has not yet advanced students from the previous year).

C. **Manually** select a group of students to schedule:

   Select students from the list using the CTRL key to select multiple students at a time.

   Select one student and use the SHIFT key to select all the students in between the first one selected and another selected.

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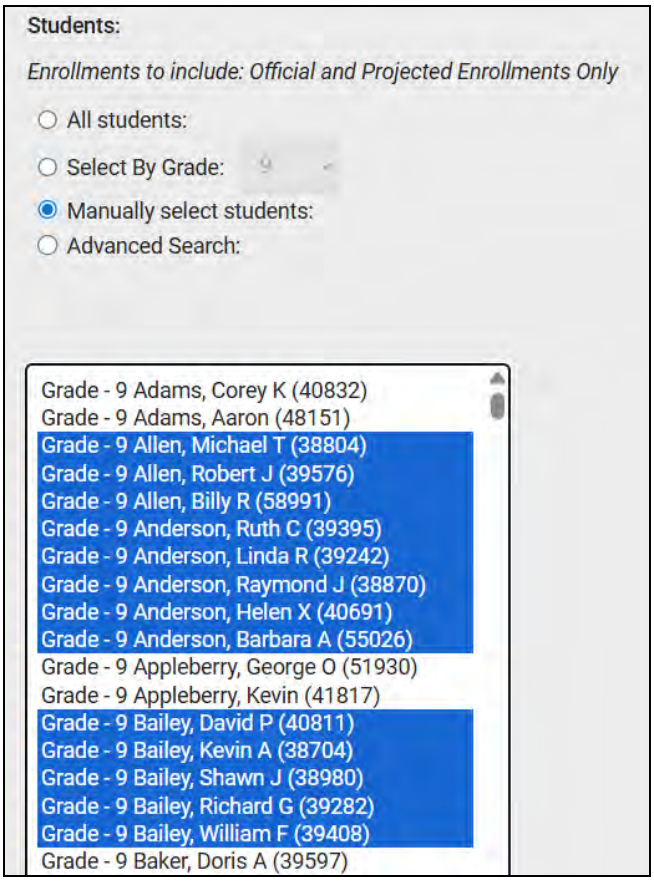
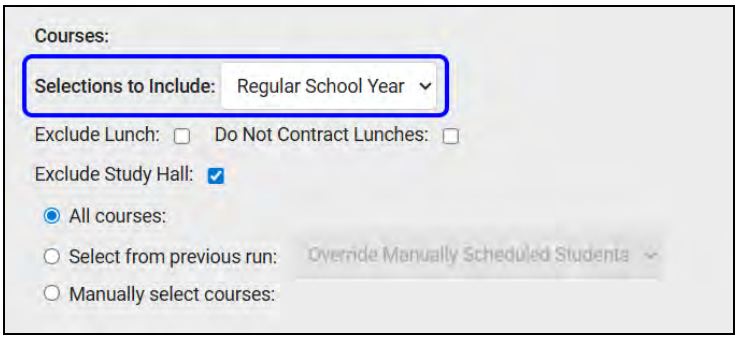


D. Select students by using an **Advanced Search** (Batch Selector). This allows you to narrow the group of students further, to only those on a specific team, those with needs in common, those with particular course requests, etc.

   Note: If you choose to run the builder for a group of students rather than for all students in the building, your pie-chart percentages may appear skewed based on the number of students able to be scheduled from the smaller population.

6. Select Courses to schedule: before choosing course options, specify which type of selections you're running the Student Schedule Builder for. When the builder runs, it will filter out any selections that do not match the Selection Type value you've chosen here. The default is Regular School Year but you can also choose Summer School.



The remaining course options allow users to run the schedule builder without loading lunches and study halls, to find the best fits. Then later, after courses are set, the schedule builder can be run again so that lunches are scheduled, and then again so that study halls are placed over the top of existing schedules.

Note: It is recommended that all incremental runs exclude study halls. If study halls are included with a run, the potential for the builder to use them to fill empty period slots, rather than trying to maximize student requests, is increased. Study hall runs are best done as an overlay, after the student schedules are as completely loaded as possible.

- **Exclude Lunch** checkbox – works if Lunch courses utilize SchoolTool's lunch logic; when this box is checked, lunch courses will not be placed into a student's schedule; when this box is unchecked, the student will be given as many lunch slots as required for the number of cycle days and marking periods
- **Do Not Contract Lunches checkbox** – this option forces students to receive lunch in the same period for the entire year, as opposed to the student receiving lunch in one period in the first semester, and a different period in the second semester.

  SchoolTool will automatically allow the student to be placed into variable-period lunches semester by semester in order to maximize meeting requests when this box is left unchecked.

  SchoolTool will not contract students out of lunch for one or more cycle days, or automatically place students into one period of lunch on certain cycle days, while in another period of lunch on alternating cycle days, within the same semester.

- **Exclude Study Hall** checkbox – works if Study Hall courses utilize SchoolTool's study hall logic; when this box is checked, study hall courses will not be placed into a student's schedule; when this box is

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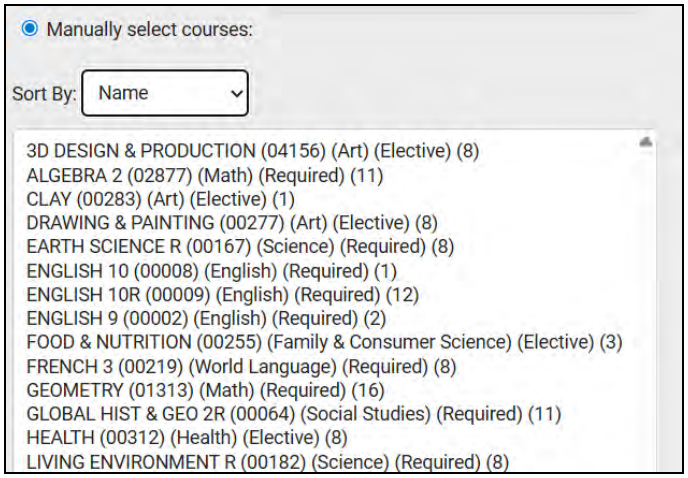
unchecked, the student will be given as many study hall slots as the builder feels appropriate.

- **All Courses** option (the default) – all courses are scheduled based on student requests.
- **Select from previous run** – use this option to re-run the same courses loaded in a previous run. This can be used in a cases where a select batch of courses is being scheduled (AP or singleton courses, for instance), but we want to try different combinations of constraints to see the results.
- **Manually select courses** – use this option to select one or more courses to run. This is often used for verifying that master schedule sections will satisfy student requests in a specific area. For example, you might choose to load only singletons, or try loading only science lecture courses with their labs.

Use the **Sort By** drop-down menu to organize the list of courses:



- **Name** – alphabetizes the list of courses by course name, in ascending order.
- **Course ID** – sorts the list by course ID, in ascending numerical order.
- **Department** – sorts the list alphabetically by department name and then by course ID within each department.
- **Elective** – sorts the list based on whether courses are "Required" or "Elective" as set up in the Course Catalog. Required courses come first.
- **Section Count** – sorts the list based on the number of sections, in ascending order, from lowest number of sections to highest. This allows users to isolate singletons, doubletons, etc, which have one or two sections.

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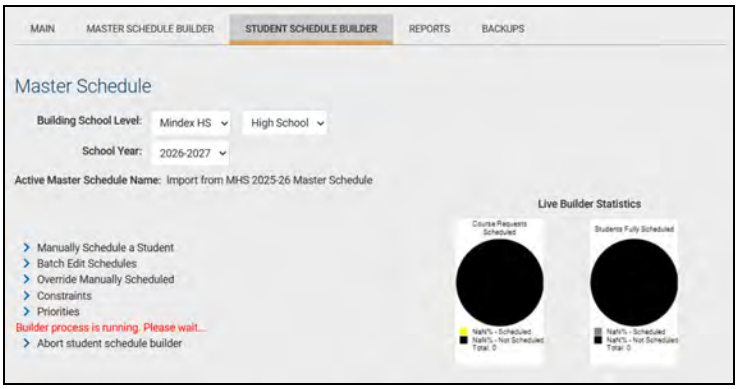
- Select courses from the list using the CTRL key to select multiple courses at a time.
- Select one course and use the SHIFT key to select all the courses in between the first one selected and another selected.

7. Once all of the settings are defined, click the **Save** button in the upper right corner.

   This initiates the load and puts students into the master schedule.

8. The screen will refresh with a message that the Builder process is running, and the name of the report will appear in the Run History below. Two pie charts will appear. Once data begins to be committed to the database, a third chart will appear.



   Note: if you wish to abort this run, click once on the Select button to the left of the Abort student schedule builder message.

9. Let the process finish (it may take anywhere from a few minutes to an hour depending on the number of students and courses, and the complexity of your constraints and priorities) and then analyze the Builder Statistics by using the pie charts.
10. As the builder progresses, messages will appear alerting you to any deficiencies with the constraints, priorities or selections. The pie graphs will also change to reflect successful schedules.

11. The Student Schedule Builder is done when all three pie charts return to a three-dimensional view.

As the Student Schedule Builder is run, dynamic pie charts update to represent the Current Schedule Statistics. Understanding how to read and use these pie charts helps put the success of your run into perspective:

- **Request Fulfillment** – shows the percentage of requests met/not met, along with the total number of requests.

  Tip: if you ran only grade 6 in the middle school, out of grades 6, 7 and 8, then the highest this number might reach would be 33% since grade 6 represents approximately a third of all student requests in the middle school.

- **Seat Capacity** – shows the percentage of filled and not-filled seats, and the total number of available seats. If this number is very low, it indicates that there are more seats than necessary to meet student requests.

  Tip: if you have double the number of seats that you need to fill student requests, the highest number you might reach here would be 50%.

- **Students Fully Scheduled** – shows the percentage of fully-placed students versus those not fully placed, along with a total number of students to be placed. If students have more requests than they have room for in their schedule, then this number may be low because it is not possible to fully schedule those requests.

Tip: if you ran only grade 12 in the high school, out of grades 9 thru 12, then the highest this number might reach would be 25% since grade 12 represents approximately a quarter of all student requests in the high school.

Notes about Running the Student Schedule Builder

- It is not recommended that multiple users try to initiate multiple runs at the same time. This may result in an error or may force the builder to abort.

- Users can navigate away from the SSB tab while a run is in process without losing their work. This allows users to continue editing student requests or master schedule sections, or to review reports, while waiting for the run to finish.
- Because the run screen is dynamic, a user who opens the Student Schedule Builder tab while a run is in process will see live pie charts, even if they are not the user who initiated the run.
- If you initiate a run for all students and all courses, and then initiate another run for all students and all courses, the results of the first run will be overwritten.
- If you initiate a run for seniors only, and then initiate another run for juniors only, followed by sophomore-only and freshman-only runs, then the results of each run will remain as you are not overriding previous run results.

Study Hall Overlay

Overlaying study halls is the process of going through each and every student schedule, locating all idle times (times when a student has no classes scheduled) and filling in these “holes” with sections of study hall.

Overlays should only be completed after counselors have had the opportunity to work with student, staff, and building schedules, resolving any conflicts and manually scheduling sections where necessary, and otherwise ensuring that the largest possible number of students have their requests met and/or have full schedules. This ensures that only those period slots that are truly available are filled with study hall sections.

A study hall overlay is done after you have performed an incremental lock. This can be done easily with SchoolTool, though we need to make sure of a few things before we do so:

1. Verify there is at least a single course in the Course Catalog for study halls, and that the course has been designated as Course Type: Study Hall.
2. Verify there are sections of this study hall course defined in the Master Schedule Editor that have enough seats for all students that need the study hall for all periods.

   This means there is at least one section per period, and that each section would need to have enough seats to cover all students that might have study hall that period. If the study hall section does not have enough seats, then more sections will be needed until there are enough.

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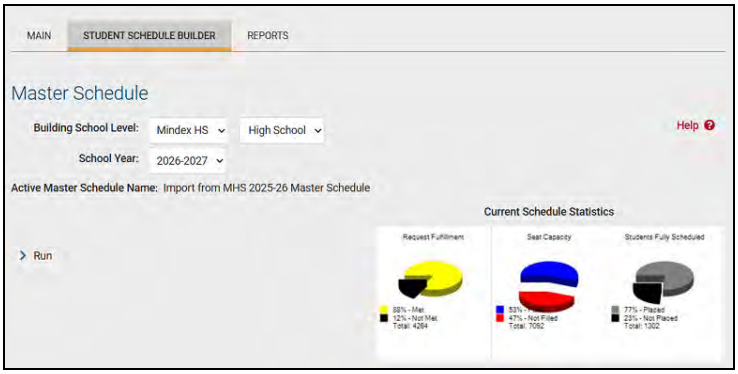
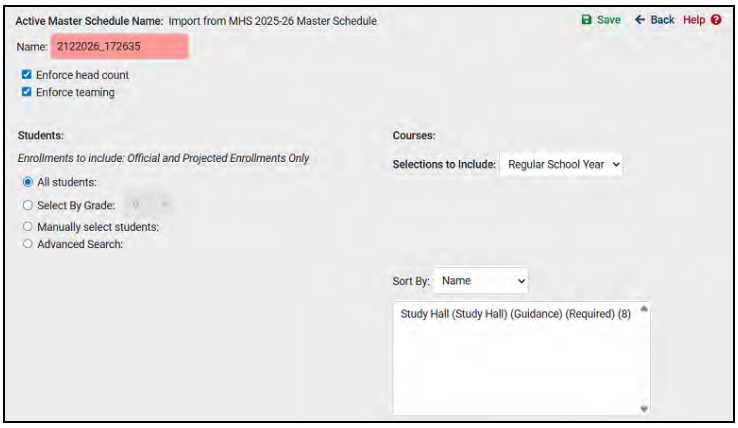
Note: If you are not sure how many study hall sections will be needed per period, run the Student Free Periods report (see *Student Free Periods Report*). The last page of this report will show you the number of students who are free in each period, which should in turn help you estimate the number of sections needed.

Note: All study hall sections should be set up as meeting every day, all year. In SchoolTool, our study hall logic allows study hall sections to be "contracted out" when a student's period-cycle day combination is already full. This flexibility prevents the need to create sections for every open meeting pattern you may find in student schedules.

3. Perform all Master Schedule Editor, Master Schedule Builder, Student Schedule Builder, and Counseling tasks that are necessary to build and confirm all students' schedules.
4. Confirm The Master Schedule has been incrementally locked once, and only once.
5. To actually run the overlay for study halls, after all of your scheduling is complete, and the schedule has been locked, click on the **Run**command from within the Student Schedule Builder.



6. The screen will refresh with a limited set of run options. Notice that a limited set of courses appear in the Courses area. Many districts will only see one option here, while others may have multiple classes that function as study halls for specific groups of students, such as seniors, who may be granted special privileges.



7. Choose appropriate options, including the study halls you would like to schedule (there is likely only one of these).
8. Click once on the Save button to start the run.
9. Refer to *Running the Student Schedule Builder* for more information on running the Student Schedule Builder.
10. Refer to *Master Schedule Whiteboard* section for details on using the Whiteboard to modify the master schedule.
11. Refer to the *Locking the Master Schedule* section to perform an incremental lock on the schedule.

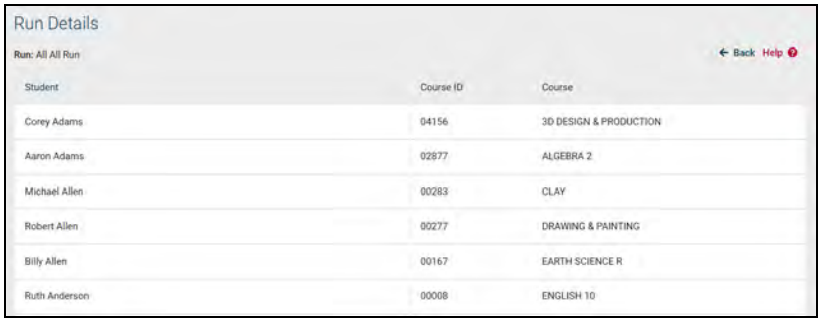
    Note: After the Run has been completed, it is recommended that you review the Section Load Report (see *Section Load Report*) for information on how the study hall sections were filled. The Section Load Report will show each cycle day and each semester, so you can understand headcount day by day throughout the year. Use this information to modify sections in the Master Schedule – i.e., make more periods where the loads are heaviest, and adjust headcounts to appropriate sizes. Then, when you complete a final study hall overlay, the Student Schedule Builder allows students to go into sections with appropriate headcounts.

    Note: It is not required that you perform a final, complete lock of the Master Schedule after your study hall overlay. Leaving the Master Schedule incrementally locked will allow users to perform updated study hall overlays as the marking periods or semesters progress, thus giving counselors the greatest flexibility in editing student schedules.

Run History

The Run History is displayed at the bottom of the Student Schedule Builder tab. This section displays all SSB runs that have been performed as part of that year's schedule. To view the details of a run, click once on the Edit button to the left of the name of the run.

The Run Details will display:



Currently, each run file contains basic data about the run. The pie charts do not reflect the Run Details you are viewing.

If you generate a run for a single grade, and then do another run for the remaining grades, the run results will be "in addition" to the results from the first single-grade run. However, if you generate a run for a single grade, then do a second run for all grades, the results from the first run are overwritten.

Note: To make a backup of the Master Schedule with these run results, use the Save Copy button in the Master Schedule Editor. (See *Backing Up and Restoring*).

Deleting Runs

To delete a student schedule run or delete all runs, click once on the appropriate Delete ✖ button or use the Delete All ✖ button in the upper right corner. The individual run, or full run history, will be removed, depending on which option you selected.

If you wish to make changes to the master schedule sections after one or more student schedule runs have been completed, you will need to delete the complete run history in order to remove students from the sections.

Note: When you use the Delete All ✖ button, *all* students are removed from the schedule. This allows you to make changes to sections or re-run the Student Schedule Builder.

Master Schedule Reports

The process of scheduling, with SchoolTool, is greatly enhanced by the use of the scheduling reports. SchoolTool offers over 200 “stock” reports, system wide, and over two dozen specifically geared toward the process of scheduling.

SchoolTool reports can be used constantly throughout the scheduling process to double check your work, and the results of SchoolTool’s automatic tools.

Report Recommendations

Reports will be covered here in the order they appear in SchoolTool, though note that a number of the reports are specifically geared toward a particular process within the Scheduling module. Here are some suggested reports that are appropriate for different tasks:

Before Building the Master Schedule

Before building the master schedule, use these master schedule reports to analyze existing course selection data and verify that all students have the correct number of course selections so that conflicts are minimized.

There are six (6) reports that we recommend you use:

- Course Selection Totals per Department
- Course Selection Reports per Department with Student Names
- Course Selections per Student
- Students without Course Selections
- Course Selections Versus Master Schedule
- Credits Selected vs. Credits Received Report

Before Running the Student Schedule Builder

Before selecting the Run button in the Student Schedule Builder, review several master schedule reports to make sure you are on track.

- Course Selections versus Master Schedule
- Double Book Report
- Section Load Report
- Timeslots Requested vs. Timeslots Available report
- Conflict Matrix

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- Singleton Conflict Matrix
- Faculty Schedule report
- Master Schedule View report
- Active Courses by Period report
- Seats Per Period Per Grade report

After Running the Student Schedule Builder

After the Student Schedule Builder has been run, use these master schedule reports to analyze the resulting schedules and resolve conflicts. Users will need to review a variety of reports to see the full picture. The goal is to place as many students with as few conflicts as possible. Additional reports allow users to see smaller details and correct problems.

- Courses Not Placed Overview
- Section Load Report
- Students with Missing Courses
- Students Missing Lunch
- Student Course Selection with Courses Information
- Not Scheduled Student Course Selection
- Student Free Periods
- Faculty Free Periods
- Student Conflict
- Credits Requested vs. Credits Received Report
- Seats Per Period Per Grade report

Schedule Reports for Students and Teachers

As you approach the end of the scheduling process, use these reports to verify individual student and faculty schedules generate schedules to be mailed home generate rosters, etc.

- Faculty Schedule – Teacher Detail
- Course Reports
- Student Schedule Reports – All, Fall, and Spring, Standard or Grid style
- Daily Roster

Available Schedule Reports:

Faculty Schedule Report

Suggested use: Before running the Student Schedule Builder

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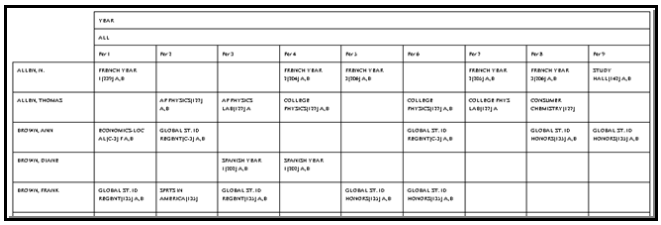
The Faculty Schedule Report provides an overview of each faculty and the periods during which they are teaching courses. The report includes course information, and can be run for all teachers, all teachers in a department or a single teacher at a time.

There are three versions of this report. A standard version which breaks down a teacher's class assignments period by period, semester by semester and cycle day by cycle day; a Detail Standard version which is a one-page-per-teacher report, and which lists every course on every cycle day, period by period; and a Detail Grid version which resembles a student schedule, with cycle days across the top and periods (with times) down the left.

To generate the Standard or Grid report:

1. Select Faculty Schedule from the list of Master Schedule report options. A sub screen will appear.
2. Select the appropriate radio button – either **All**for all courses/teachers, or **Teacher**to show the Faculty Schedule for a teacher or a group of teachers by department.
3. Select the Standard or Grid radio button. (Both will result in the same report.)
4. Click once on the Run Report button.



	YEAR								
	ALL								
	Per 1	Per 2	Per 3	Per 4	Per 5	Per 6	Per 7	Per 8	Per 9
ALLEN, H.	FRENCH YEAR 1(173) A,B			FRENCH YEAR 1(104) A,B	FRENCH YEAR 3(106) A,B		FRENCH YEAR 1(106) A,B	FRENCH YEAR 3(106) A,B	STUDY HALL(140) A,B
ALLEN, THOMAS		AP PHYSICS(173) A,B	AP PHYSICS LAB(173) A	COLLEGE PHYSICS(173) A,B		COLLEGE PHYSICS(173) A,B	COLLEGE PHYS LAB(173) A	CONSUMER CHEMISTRY(173)	
BROWN, ANN	ECONOMICS-LOC ALL(C-2) F A,B	GLOBAL ST. 10 REGENT(C-2) A,B				GLOBAL ST. 10 REGENT(C-2) A,B		GLOBAL ST. 10 HONORS(126) A,B	GLOBAL ST. 10 HONORS(126) A,B
BROWN, DUANE			SPANISH YEAR 1(205) A,B	SPANISH YEAR 1(205) A,B					
BROWN, FRANK	GLOBAL ST. 10 REGENT(126) A,B	SPRTS IN AMERICA (126)	GLOBAL ST. 10 REGENT(126) A,B		GLOBAL ST. 10 HONORS(126) A,B	GLOBAL ST. 10 HONORS(126) A,B			

This report will be multiple pages in length.

- The first page will be the full-year view for all teachers, all periods and all cycle days.

  Note: Each cell holds a limited number of characters and it may not be possible to see everything a teacher teaches per period, if

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they teach different courses on different cycle days in the same period.

- The next group of pages will represent the first marking period and the first cycle day, and then the first marking period and the next cycle day, etc, until all marking periods and all cycle day variations are displayed on individual pages.
- Make sure to review all pages of the report to get a full picture of the schedule for all marking periods and cycle days.

Master Schedule View Report

Suggested use: Before running the Student Schedule Builder

The Master Schedule View report provides an overview, by full year or semester by semester, of how classes have been scheduled into rooms and how teachers have been scheduled for classes.

There are two versions of this report:

- **Room**– room allocation period by period with all courses in each room for each cycle day; can be run for all rooms or a particular room. Users can choose to display or hide Course information, Cycle Days, Faculty names, and Semesters.
- **Faculty**– faculty schedules by period with all courses for each cycle day; can be run for all teachers, all teachers in a department or a single teacher. Users can choose to display or hide Course information, Cycle Days, Room numbers, and Semesters.

  Note: These reports open in the application instead of in a separate pop-up window as with most other reports. To use this report while editing the master schedule, you may want to open multiple instances of SchoolTool, and have one open to this report.

  Note: There is no way to directly print this report from this page. To print this information, you will have to copy/paste this information to another spreadsheet or document.

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To generate this report for Rooms:

1. Select the radio button for **Room.** This is the default view of this report.
2. Select ALL (for all rooms), or choose a room from the drop-down list. 'ALL' is the default.
3. Select the appropriate Semester from the drop-down menu. 'ALL' is the default.
4. Check or uncheck the boxes to note which fields to display or hide: Course, Faculty, Cycle Days, Semester. The default is set to display all.
5. Click once on the Run Report button. The report will update on this screen.

To generate this report for Faculty:

1. Select the radio button for **Faculty**.
2. Select the Department from the first drop-down list. 'ALL' is the default and will result in a report with all teachers in the building.
3. Select the Teacher from the second drop-down list. 'ALL' is the default and will result in a report with all teachers in the department.
4. Select the appropriate Semester from the drop-down menu. 'ALL' is the default.

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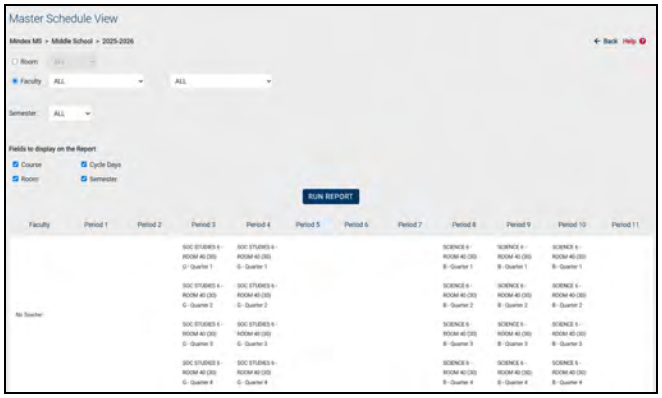
5. Check or uncheck the boxes to note which fields to display or hide: Course, Room, Cycle Days, Semester. The default is set to display all.
6. Click once on the Run Report button. The report will update on this screen.

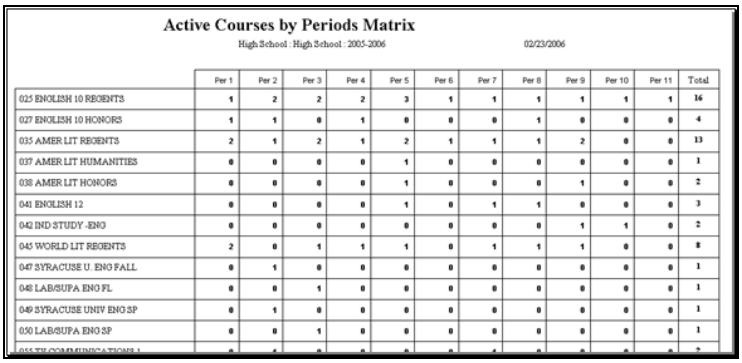


Active Courses by Period Matrix

Suggested use: Before running the Student Schedule Builder

This report is used to see an overall view of sections per period. Users can quickly see section counts per course so they can assign or hire faculty. Also, they can see if they do not have enough sections of a course.

This report automatically appears when selected. There is no pre-screen.



Active Courses by Periods Matrix

High School : High School : 2005-2006 02/23/2006

	Per 1	Per 2	Per 3	Per 4	Per 5	Per 6	Per 7	Per 8	Per 9	Per 10	Per 11	Total
025 ENGLISH 10 REGENTS	1	2	2	2	3	1	1	1	1	1	1	16
027 ENGLISH 10 HONORS	1	1	0	1	0	0	0	1	0	0	0	4
035 AMER LIT REGENTS	2	1	2	1	2	1	1	1	2	0	0	13
037 AMER LIT HUMANITIES	0	0	0	0	1	0	0	0	0	0	0	1
038 AMER LIT HONORS	0	0	0	0	1	0	0	0	1	0	0	2
041 ENGLISH 12	0	0	0	0	1	0	1	1	0	0	0	3
042 IND STUDY -ENG	0	0	0	0	0	0	0	0	1	1	0	2
045 WORLD LIT REGENTS	2	0	1	1	1	0	1	1	1	0	0	8
047 SYRACUSE U. ENG FALL	0	1	0	0	0	0	0	0	0	0	0	1
048 LAB/SUPA ENG FL	0	0	1	0	0	0	0	0	0	0	0	1
049 SYRACUSE UNIV ENG SP	0	1	0	0	0	0	0	0	0	0	0	1
050 LAB/SUPA ENG SP	0	0	1	0	0	0	0	0	0	0	0	1
055 TV COMMUNICATIONS 1	0	1	0	0	0	0	1	0	0	0	0	2

Note: At the far right of each course row, you can see the total number of sections for that course. At the bottom of the last page of this report, you will see the total number of sections per period across all courses, as well as the total number of sections overall.

860A NEW VISION EDUCATION (AM)	1	0	0	0	0	0	0	0	0	1
860B NEW VISION EDUCATION (PM)	0	0	0	0	0	1	0	0	0	1
890 LUNCH	0	0	0	0	2	2	2	2	0	8
Total	128	115	93	105	89	108	95	103	103	939

Courses Not Placed Overview Report

Suggested use: After running the Student Schedule Builder

The Courses Not Placed Overview report option has a feature-rich pre-screen allowing for searching and sorting of courses based on the students that did, or did not, get scheduled into courses they selected.

This screen is useful after a Student Schedule Builder run has been completed. With it, we can examine all courses that did not have perfect placement as well as the students that were not placed. We can print multiple reports that examine these courses and students as well as directly modify a student's schedule to ensure they are placed in the appropriate course sections.

Note: By default, SchoolTool allows you to see 20 students and their schedules at a time.

- Courses that have more than 20 students not placed will display a red flag 🚩 to the far left of the course row.

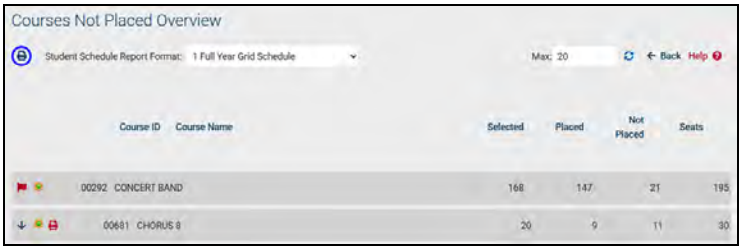
- In order to see more than 20 students at a time, use the Max field at the upper right of the Courses Not Placed Overview Screen. Change this to a number higher than 20, say 28, and then click the Refresh button. The screen will update and the red flags will change to green Expand buttons so you can see the names and schedules of the 28 (or less) students.

- The Courses Not Placed Overview screen opens with a full list of all courses that students have selected. Alongside of each course name, are four columns of numbers:

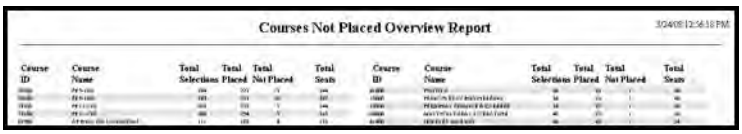
  - **Selected**: This number represents the total number of students that have selected a particular course.
  - **Placed**: This number indicates the number of students that are currently scheduled into all of the course's sections. Students could have been scheduled manually by an administrator or counselor, or the student could have been placed into a course section with the Student Schedule Builder automatic tools.
  - **Not Placed**: This is the number of students that have selected the course, but did not get scheduled for it. They may not have been included in the Student Schedule Builder run, may have a scheduling conflict, or may have a constraint conflict.
  - **Seats**: This is the number of seats available across all sections of this course. If you see that the number of seats is too small to meet the number of requests, this would explain why students were not placed.

Printing Reports

To print the information presented on this screen in a report format simply click on the Courses Not Placed Overview Report printer button in the upper left corner of the screen.

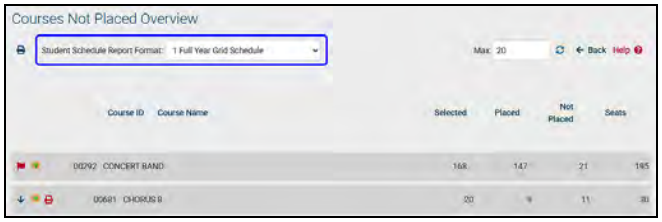


This report summarizes the information found on the pre-screen, placing course information in two columns to help minimize the number of pages. **This report ignores the Student Schedule Report Format selected in the drop-down menu.**



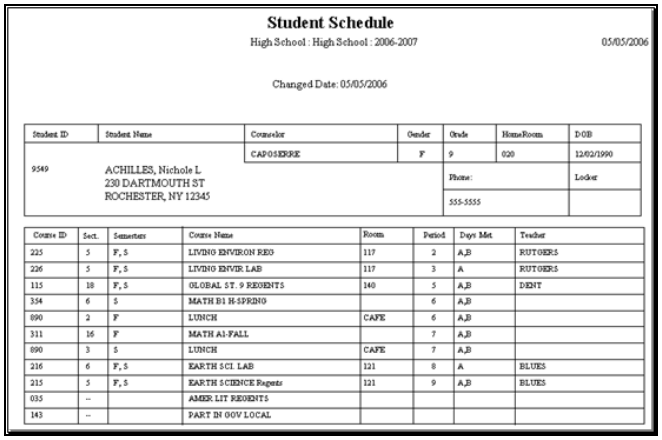
If you would like to see the schedules of all students that did not make it into a specific course, use the dropdown at the top of the screen to select the report format you wish to use.

1. Select the report format you would like from the drop-down at the top of the screen.



2. Click on the Print Student Schedules button next to the course you would like to see.

The report will open in a separate pop-up window.



Student Schedule

High School : High School : 2006-2007 05/05/2006

Changed Date: 05/05/2006

Student ID	Student Name	Counselor	Gender	Grade	HomeRoom	DOB
9549	ACHILLES, Nichole L 230 DARTMOUTH ST ROCHESTER, NY 12345	CAP05ERRE	F	9	020	12/02/1990
				Phone:		Locker
				555-5555		

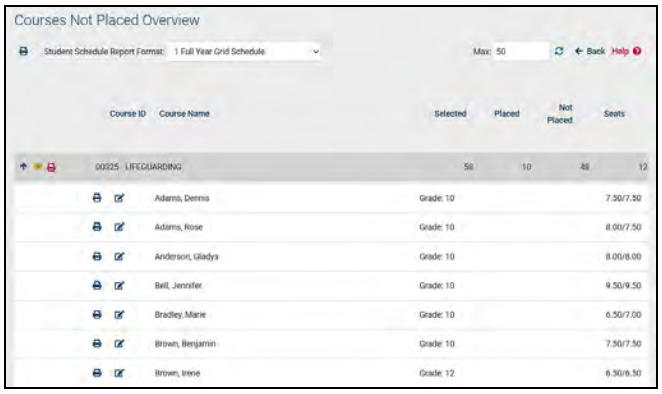
Course ID	Sect.	Semesters	Course Name	Room	Period	Days Met	Teacher
225	5	F, S	LIVING ENVIRON REG	117	2	A,B	RUTGERS
226	5	F, S	LIVING ENVIR LAB	117	3	A	RUTGERS
115	18	F, S	GLOBAL ST. 9 REGENTS	140	5	A,B	DENT
354	6	S	MATH B1 H-SPRING		6	A,B	
090	2	F	LUNCH	CAFE	6	A,B	
311	16	F	MATH A1-FALL		7	A,B	
090	3	S	LUNCH	CAFE	7	A,B	
216	6	F, S	EARTH SCI. LAB	121	8	A	BLUES
215	5	F, S	EARTH SCIENCE Regents	121	9	A,B	BLUES
035	--		AMER LIT REGENTS				
143	--		PART IN GOV LOCAL				

Note: If you had chosen the Student Missing Courses report format from the top of the screen, you will not only see the students' schedules, but you will see courses the student requested, but did not get, at the bottom. These not-placed courses show up with no section number, room, period, days met, or teacher.

Drilling into Courses

With this screen, we have the ability to "drill down" through the courses that contain not-placed students. That is, instead of printing a series of reports and searching for specific students, we can view the students on the screen, and print their schedules individually as we please.

1. Locate the course that has not-placed students.
2. Click once on the green Expand button next to the course to see the students that were not placed.



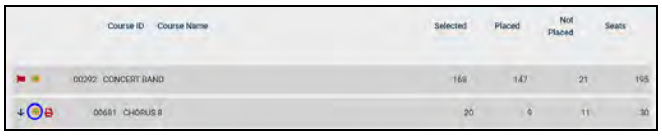
Notice the Expand button is now a Collapse button. Clicking on this will hide the list of students so you can quickly expand another course.

Each student row includes the student's name, current grade and credits scheduled versus credits selected.

3. From within each student record, you have two options:
   - Use the Print Student Schedule button to print the individual student's schedule. The report that prints will be based on the report format selected at the top of this screen in the Student Schedule Report Format drop-down.
   - Use the Manually Edit Student Schedule button to view a student's schedule, evaluate why the student did not get placed into a section of this class, and if appropriate, manually place the student into their courses. (See *Manually Scheduling a Student* for specifics.)

Performing a Mini Student Schedule Run

Users may also perform a mini student schedule run for a select group of students for a specific course. Use the Student Schedules Run button to the left of the course row to remove the schedules from the students who were not placed into sections of this course and re-run their full schedules, without affecting the rest of the students who have already been scheduled into this course section(s).



Course Reports

Suggested use: After running the Student Schedule Builder

The Course Report is similar to a class roster. It shows the individual students in each section of a course, along with their gender, grade, counselor and date of birth.

The Course Reports report will initially prompt for the type of report to create:

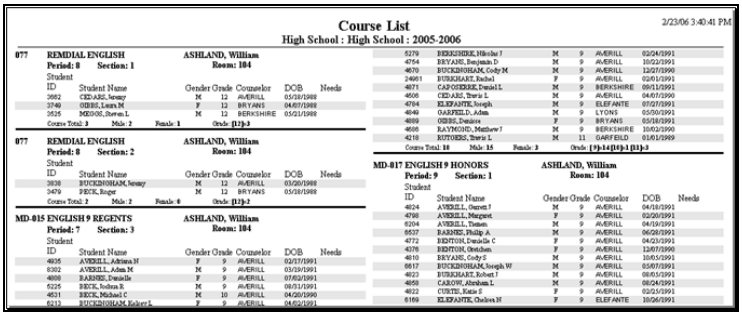
- **All**to report on all sections of all courses
- **Teacher**to report on all of a specific teacher's courses or all teachers within a department's courses

- **Course**to report on only a specific course, or all courses within a department

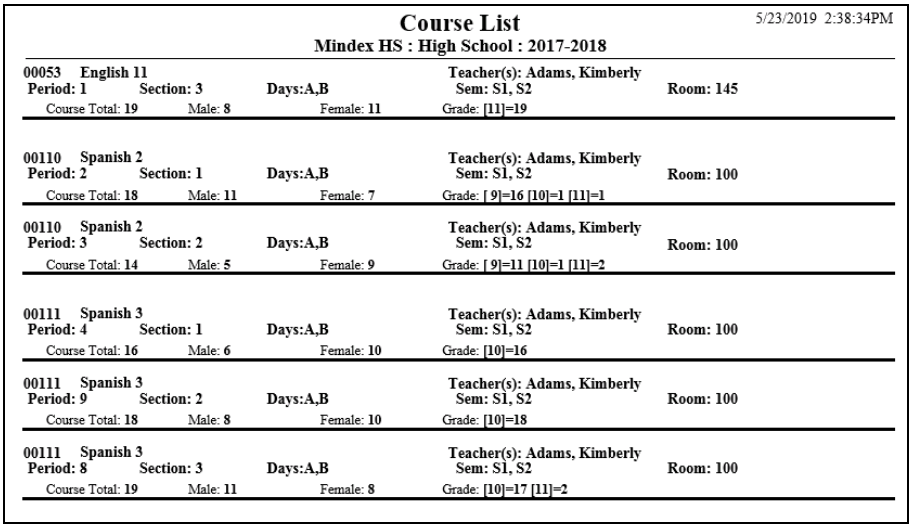
Additional Report Options allow the user to decide how the information will display in the report:

- **Landscape** prints as many courses as can fit on a landscape-format page, scrolling the courses across two columns, as necessary. This is a paper-saving report, utilizing a smaller text size to fit more on a single page.
- **Portrait** prints as many courses as can fit on a portrait-format page, scrolling courses across multiple pages, as necessary. The text size in this report is slightly larger and thus easier to read.
- **Page breaks after each section**allow the user to conserve paper by printing multiple courses per page (when the box is unchecked) or print roster-style reports wit
- h one course per page (when the box is checked).
- **Hide student details** allows the user to generate this report with course information only (all individual student rows will be hidden).

Sample of the default Landscape format with student details visible:



Sample Portrait format with student details hidden:



Course List 5/23/2019 2:38:34PM

Mindex HS : High School : 2017-2018

00053 English 11 — **Teacher(s): Adams, Kimberly**
Period: 1 **Section: 3** **Days:A,B** **Sem: S1, S2** **Room: 145**
Course Total: **19** Male: **8** Female: **11** Grade: **[11]=19**

00110 Spanish 2 — **Teacher(s): Adams, Kimberly**
Period: 2 **Section: 1** **Days:A,B** **Sem: S1, S2** **Room: 100**
Course Total: **18** Male: **11** Female: **7** Grade: **[9]=16 [10]=1 [11]=1**

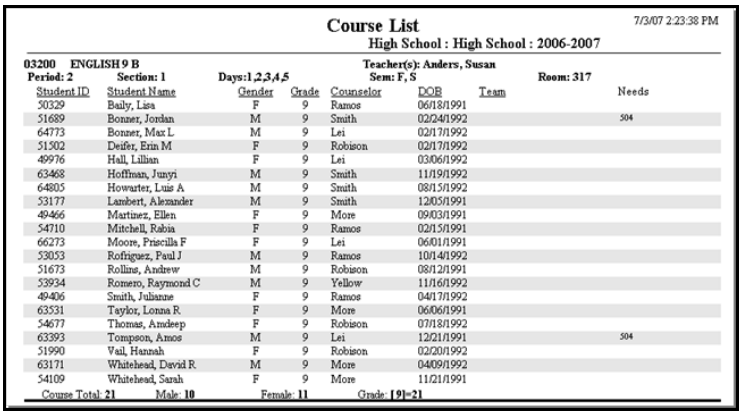
00110 Spanish 2 — **Teacher(s): Adams, Kimberly**
Period: 3 **Section: 2** **Days:A,B** **Sem: S1, S2** **Room: 100**
Course Total: **14** Male: **5** Female: **9** Grade: **[9]=11 [10]=1 [11]=2**

00111 Spanish 3 — **Teacher(s): Adams, Kimberly**
Period: 4 **Section: 1** **Days:A,B** **Sem: S1, S2** **Room: 100**
Course Total: **16** Male: **6** Female: **10** Grade: **[10]=16**

00111 Spanish 3 — **Teacher(s): Adams, Kimberly**
Period: 9 **Section: 2** **Days:A,B** **Sem: S1, S2** **Room: 100**
Course Total: **18** Male: **8** Female: **10** Grade: **[10]=18**

00111 Spanish 3 — **Teacher(s): Adams, Kimberly**
Period: 8 **Section: 3** **Days:A,B** **Sem: S1, S2** **Room: 100**
Course Total: **19** Male: **11** Female: **8** Grade: **[10]=17 [11]=2**

Sample Portrait format with larger font size:



Course List 7/3/07 2:23:38 PM

High School : High School : 2006-2007

03200 ENGLISH 9 B — **Teacher(s): Anders, Susan**
Period: 2 **Section: 1** **Days:1,2,3,4,5** **Sem: F, S** **Room: 317**

Student ID	Student Name	Gender	Grade	Counselor	DOB	Team	Needs
50329	Baily, Lisa	F	9	Ramos	06/18/1991		
51689	Bonner, Jordan	M	9	Smith	02/24/1992		504
64773	Bonner, Max L	M	9	Lei	02/17/1992		
51502	Deifer, Erin M	F	9	Robison	02/17/1992		
49976	Hall, Lillian	F	9	Lei	03/06/1992		
63468	Hoffman, Junyi	M	9	Smith	11/19/1992		
64805	Howarter, Luis A	M	9	Smith	08/15/1992		
53177	Lambert, Alexander	M	9	Smith	12/05/1991		
49466	Martinez, Ellen	F	9	More	09/03/1991		
54710	Mitchell, Rabia	F	9	Ramos	02/15/1991		
66273	Moore, Priscilla F	F	9	Lei	06/01/1991		
53053	Rodriguez, Paul J	M	9	Ramos	10/14/1992		
51673	Rollins, Andrew	M	9	Robison	08/12/1991		
53934	Romero, Raymond C	M	9	Yellow	11/16/1992		
49406	Smith, Julianne	F	9	Ramos	04/17/1992		
63531	Taylor, Lonna R	F	9	More	06/06/1991		
54677	Thomas, Amdeep	F	9	Robison	07/18/1992		
63393	Tompson, Amos	M	9	Lei	12/21/1991		504
51990	Vail, Hannah	F	9	Robison	02/20/1992		
63171	Whitehead, David R	M	9	More	04/09/1992		
54109	Whitehead, Sarah	F	9	More	11/21/1991		

Course Total: **21** Male: **10** Female: **11** Grade: **[9]=21**

Course Selection Totals per Department

Suggested use: Before building the Master Schedule

The Course Selection Totals per Department report lists all courses in a summary-style view, including details such as department, course number, course name, total number of selections (requests), break down of requests by gender and grade, and priority (High, Medium, Low) by course.

This report is used to verify section counts for faculty usage and to ensure the students who have requested the courses are in an appropriate grade for the course.

This report automatically appears when selected. There is no pre-screen.

Course Selection Totals per Department

High School : High School : 2004-2005

5/16/05 3:15:29 PM

Department	Course #	Course Name	Selected	Male	Female	Priority	Grade Breakdown
Art							
	571	FOUND IN MEDIA ARTS	95	58	37	High	[9]=53 [10]=25 [11]=9 [12]=8
	571	FOUND IN MEDIA ARTS	1	1	0	Medium	[12]=1
	650	STUDIO IN ART	154	85	69	High	[9]=71 [10]=51 [11]=17 [12]=15
	651	INTRO JEWELRY MKG	41	5	36	High	[10]=7 [11]=14 [12]=20
	652	DRAWING & PAINTING 1	40	19	21	High	[9]=1 [10]=17 [11]=12 [12]=10
	653	DRAWING & PAINTING 2	26	12	14	High	[10]=13 [11]=7 [12]=6
	654	INTRO TO ANIMATION	16	10	6	High	[10]=9 [11]=4 [12]=3
	655	ADVANCED JEWELRY MAKING	16	0	16	High	[10]=3 [11]=7 [12]=6
	658	SCULPTURE 1	11	4	7	High	[10]=2 [11]=3 [12]=6
	662	COMP GRAPHICS DESIGN	51	27	24	High	[10]=23 [11]=11 [12]=17
	663	ADV COMPUTER GRAPHIC	33	21	12	High	[10]=12 [11]=9 [12]=12
	665	CERAMICS 1	14	5	9	High	[10]=3 [11]=4 [12]=7
	666	CERAMICS 2	10	3	7	High	[10]=1 [11]=3 [12]=6
	668	ADV STUDY IN ART	8	2	6	High	[11]=2 [12]=6
	670	THE WEB.COM	28	23	5	High	[10]=4 [11]=9 [12]=15

Note: This report displays one row per **priority**. In the above example, Course # 571 FOUND IN MEDIA ARTS looks as if it is duplicated (i.e., two rows), but really, there are two rows, one for each priority value (i.e., 95 selections as priority = HIGH and 1 selection with priority = MEDIUM).

Note: Priority comes from the Student Course Selection screens. If the course is a core class, it will automatically display with a priority of High. If the course is designated as an elective course in the Course Catalog, the user may assign a priority of High, Medium, or Low to the course when entering student selections. The selected priority then displays here.

Course Selection Reports per Department with Student Names

Suggested use: Before building the Master Schedule

The Course Selection Reports per Department with Student Names report lists all students who requested a course. This report includes details such as student ID, student name, gender, grade, counselor and date of birth. Each page has a total number of selections and a break down by gender and by grade. Use this report to review selection details.

There is a pre-screen for this report that prompts for **All** (all courses and students) or for a specific department and **Course**.

Note: This report is a landscape-format report, and student names will scroll across two columns, or multiple pages as necessary. There is no way to change the text size or display of information in this report.

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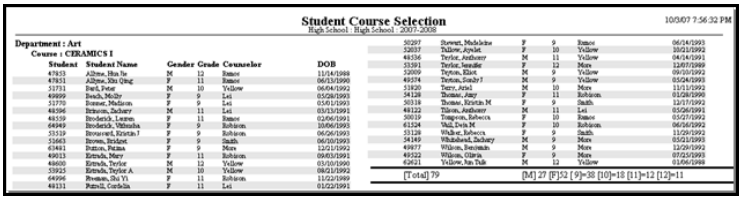

Student Course Selection

High School : High School : 2007-2008

10/3/07 7:56:32 PM

Department : Art

Course : CERAMICS I

Student	Student Name	Gender	Grade	Counselor	DOB
47853	Albrecht, Hsin Ya	M	12	Ramos	11/14/1988
47851	Albrecht, Hsi Qing	F	11	Ramos	06/13/1990
51751	Ford, Peter	M	10	Yellow	06/04/1992
49999	Beach, McKir	F	9	Lei	05/28/1993
51770	Bonner, Madison	F	9	Lei	05/01/1993
48596	Brinson, Zachary	M	11	Lei	03/13/1991
48559	Broderick, Lauren	F	11	Ramos	02/06/1991
64949	Broderick, Wilhelmina	F	9	Robinson	10/06/1993
55519	Brouwerd, Kirstin J	F	9	Robinson	06/26/1993
51663	Brown, Bridget	F	9	Smith	06/10/1993
63441	Dutton, Palma	F	9	Moss	12/21/1992
49013	Estrada, Mary	F	11	Robinson	09/03/1991
48600	Estrada, Taylor	M	12	Yellow	03/10/1990
55925	Estrada, Taylor A	M	10	Yellow	08/21/1992
64996	Freeman, Ho Yi	F	11	Robinson	11/22/1989
48131	Patrick, Cordelia	F	11	Lei	01/22/1991
50297	Stewart, Madeleine	F	9	Ramos	06/24/1993
52037	Tallow, Kaylee	F	10	Yellow	10/21/1992
48536	Taylor, Anthony	M	11	Yellow	04/24/1991
51591	Taylor, Jennifer	F	12	Moss	12/07/1989
52009	Tayton, Elliot	M	9	Yellow	09/10/1992
49374	Tayton, Jonathan	M	9	Yellow	05/24/1993
51820	Terry, Ariel	M	10	Moss	11/11/1992
54128	Thomas, Amy	F	11	Robinson	01/28/1990
50318	Thomas, Kirstin M	F	9	Smith	12/17/1992
48122	Tilson, Anthony	M	11	Lei	05/26/1991
50019	Tompson, Rebecca	F	10	Ramos	05/27/1992
61524	Vail, Dwin M	F	10	Robinson	06/16/1992
53128	Walker, Rebecca	F	9	Smith	11/29/1992
54149	Whitehead, Zachary	M	9	Moss	05/21/1993
49877	Wilson, Benjamin	M	9	Moss	12/29/1992
49522	Wilson, Gloria	F	9	Moss	07/25/1993
62621	Yellow, Jun Dak	M	12	Yellow	01/06/1988
[Total] 79					

[M] 27 [F]:52 [9]=38 [10]=18 [11]=12 [12]=11

Course Selections per Student

Suggested use: Before building the Master Schedule

The Course Selections per Student report can be generated for all students, a single student, a single grade or a homeroom. Details on the report include student demographic data, as well as a listing of each course selected, its priority, its credits, and a total number of credits selected overall. This report will also include a Request Type column which shows whether the selected courses are associated with Summer School or the Regular School Year. This can be used to send home to parents before the schedule is set, for their approval.

There is a pre-screen for this report that provides the ability to print **All Students**, or a single **Homeroom**, **Grade**, or **Student**.

In addition, users may Sort By the following options: alphabetically by **Student** last name, numerically by **Homeroom** number, alphabetically by **Counselor** last name, numerically by **Grade**, or numerically by **Zip Code**.

Student Course Selections

Mindex HS : High School : 2023-2024 05/20/2024

Student ID	Name & Address	Sex	Grade	DOB	Phone
31178	Ross, Elizabeth P 14 Douglas Street Rochester, NY 12345	F	10	10/03/2007	(555) 537-6750

Course #	Course Name	Priority	Credits	Request Type
00003	ENGLISH 9R	High	1.00	Regular School Year
00064	GLOBAL HIST & GEO 2R	High	1.00	Regular School Year
00120	CONSUMER MATH	High	1.00	Summer School
00143	CALCULUS PREP	High	1.00	Summer School
00180	LIVING ENVIRONMENT	High	1.00	Regular School Year
00312	HEALTH	High	1.00	Regular School Year
00322	PHYSICAL EDUCATION	High	0.50	Regular School Year
02162	SKILLS - AL/LE	High	0.00	Regular School Year
03540	INTRO DIGITAL MEDIA ART	High	1.00	Regular School Year
04268	ALGEBRA 1A	High	1.00	Regular School Year
04269	ALGEBRA 1B	High	1.00	Regular School Year
			9.50	

Timeslots Requested vs Timeslots Available

Suggested use: Before running the Student Schedule Builder

The Timeslots Requested vs. Timeslots Available report is a useful tool to verify that students have the correct number of selections before you run the Student Schedule Builder.

Note: This report will not fully populate until Master Schedule sections exist for all courses which have requests.

The available timeslots are figured based on:

(# of cycle days × # of semesters × # of periods in a day) - # of slots for lunch

For example, if there are 6 cycle days, 2 semesters (fall and spring) and 8 periods per day, this is a total of (6 x 2 x 8) 96 slots, minus 12 slots for lunch (which are assumed in SchoolTool's logic: 6 cycle days times 2 semesters). That gives us 84 available slots for classes, as seen below.

7/3/073:02:41 PM

Timeslots Requested vs. Timeslots Available

Timeslots requested: 104.00 Timeslots available: 84

StudentID	FirstName	LastName
52015	Matvey	Stevens

Timeslots requested: 102.00 Timeslots available: 84

StudentID	FirstName	LastName
50065	Tiffany	Gabaldon

Timeslots requested: 95.00 Timeslots available: 84

StudentID	FirstName	LastName
49466	Ellen	Martinez
50350	Adam	King
52010	Jennifer	Lei
52189	Aishwarya	Riddle
54741	Alba	King
54753	Gabriel	Jake

Timeslots requested: 82.00 Timeslots available: 84

StudentID	FirstName	LastName
47764	George	Walker
51910	Rafael	Mitchell
51954	Molly	Spore

Timeslots requested: 81.00 Timeslots available: 84

StudentID	FirstName	LastName

The first sections of the report (above) show you students who have selected more slots than they have available (i.e., Matvey Stevens has 104 slots requested and Tiffany Gabaldon has 102 slots requested). This indicates that when you run the load, they will not be able to be fully scheduled since some courses cannot fit.

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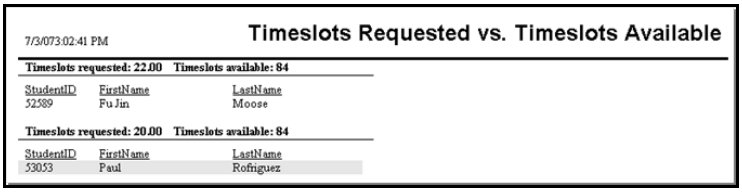


7/3/073:02:41 PM

Timeslots Requested vs. Timeslots Available

Timeslots requested: 22.00 Timeslots available: 84

StudentID	FirstName	LastName
52589	Fu Jin	Moose

Timeslots requested: 20.00 Timeslots available: 84

StudentID	FirstName	LastName
53053	Paul	Rofriguez

The end of the report shows students who don't have enough selections. Use this to help fully schedule students who may have fallen through the cracks or who may have only recently been enrolled, or ignore students who should only have a few selections, such as part time students, 5th year seniors, etc.

Note: If a student has requested a course that is blocked (ie, two periods long) or which runs for multiple periods in a row (such as Vo-Tech courses), this report may indicate that the student does not have enough timeslots requested. But as long as you understand what courses have been selected and how they are set up, you can ignore the numbers.

Note: This report only includes basic student data: ID, first name and last name. All students in the selected school building are displayed together, and the order is random (i.e. not alpha.)

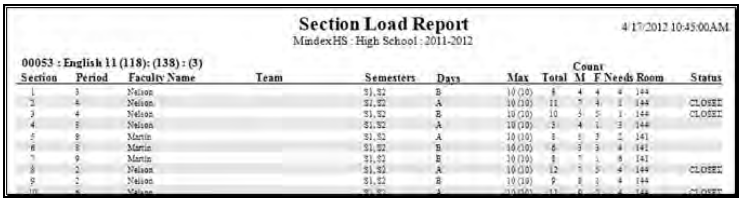
Section Load Report

This report shows all sections of each course with details such as the period the section is delivered in, the faculty who instructs the section, the team assigned to that section (if one), the semesters and cycle days when the course meets, the room where it meets and the current status (closed or null which is open). Additionally, the following totals are included in this report:

- Max: maximum head count for the section
- Total: number of students currently in the section
- Total boys (M) and girls (F) in the section
- Needs: total special-needs students (denoted by the student having a Needs-designated program service record) in the section

Users can print or export this report, or use the tree to navigate to a particular course. Use the details here to understand the number of students who requested the course, the number who got into the course and the number who didn’t. This is helpful in balancing sections and clearing up bottlenecks in scheduling.

For example, for Course # 00053 English 11 (below), there were 118 total selections for that course (1st number in parentheses), but 138 seats are actually occupied for this course (2nd number in parentheses; this will include any students taking the course twice, or students who have been manually scheduled for the course). This resulted 3 students who selected the course but did not get at least one section of that course (in the 3rd parentheses).



Section Load Report

MindexHS : High School : 2011-2012

4/17/2012 10:45:00AM

00053 : English 11 (118): (138) : (3)

Section	Period	Faculty Name	Team	Semesters	Days	Max	Total	Count M	Count F	Count Needs	Room	Status
1	3	Nelson		S1,S2	B	10 (10)	8	4	4	0	144	
2	4	Nelson		S1,S2	A	10 (10)	11	7	4	1	144	CLOSED
3	4	Nelson		S1,S2	B	10 (10)	10	5	5	1	144	CLOSED
4	5	Nelson		S1,S2	A	10 (10)	5	4	1	-3	144	
5	8	Martin		S1,S2	A	10 (10)	8	5	3	2	141	
6	8	Martin		S1,S2	B	10 (10)	6	3	3	4	141	
7	9	Martin		S1,S2	B	10 (10)	8	7	1	6	141	
8	2	Nelson		S1,S2	A	10 (10)	12	7	5	4	144	CLOSED
9	2	Nelson		S1,S2	B	10 (10)	9	8	1	4	144	
10	5	Nelson		S1,S2	A	10 (10)	11	6	5	4	144	CLOSED

This report automatically appears when selected. There is no pre-screen.

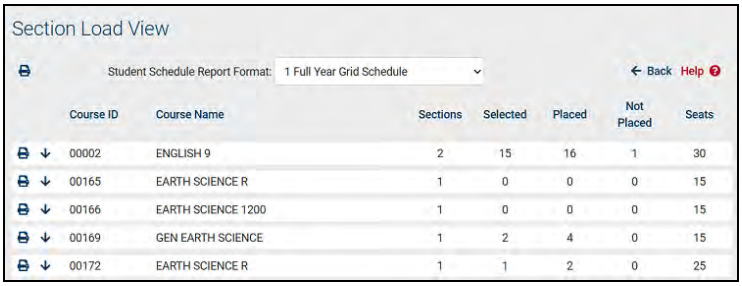
Note: Courses such as labs may display with 0 requests but a large number placed. This usually indicates that the lab was linked to a lecture course and students were placed into the sections based on requests for the lecture.

Note: Study halls and lunches will often display as though each period and section is duplicated, tripled or quadrupled, etc, based on the number of cycle day and semester combinations possible. This is to allow the greatest scheduling flexibility in giving a student only what they need or have room for.

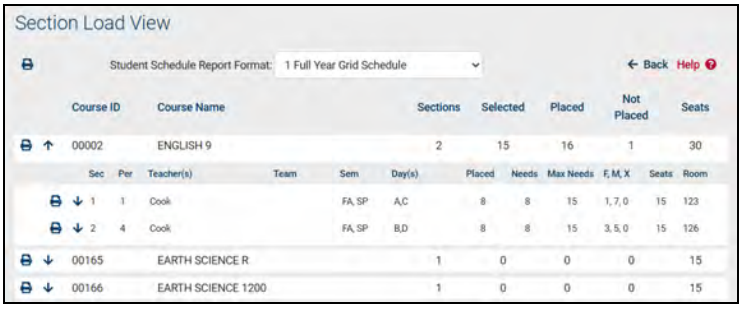
Section Load View

The Section Load View reflects the information presented in the Section Load Report, but allows users to toggle between various views, print a Section Load Report based on their current view, or print student schedules. It also allows users to drill down to various levels of detail and make changes as appropriate.

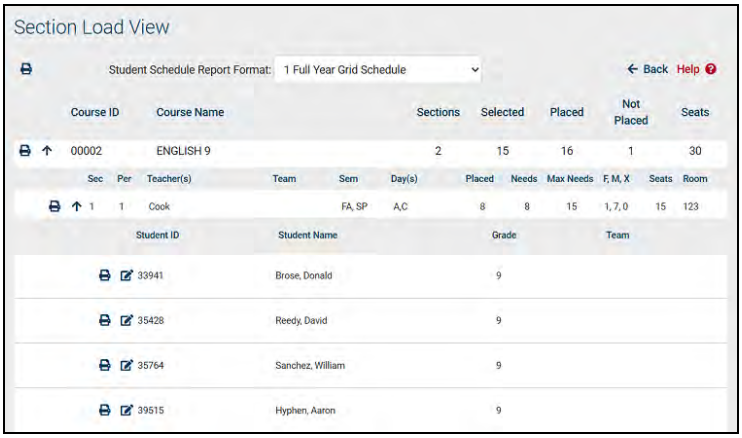
When first accessing the Section Load View, a list of all courses from the Master Schedule appears. The user can use the Print icon in the top left corner of the screen to print the Section Load Report for all courses. In addition, each course has its own Print icon, allowing users to print the Section Load Report for that course only.



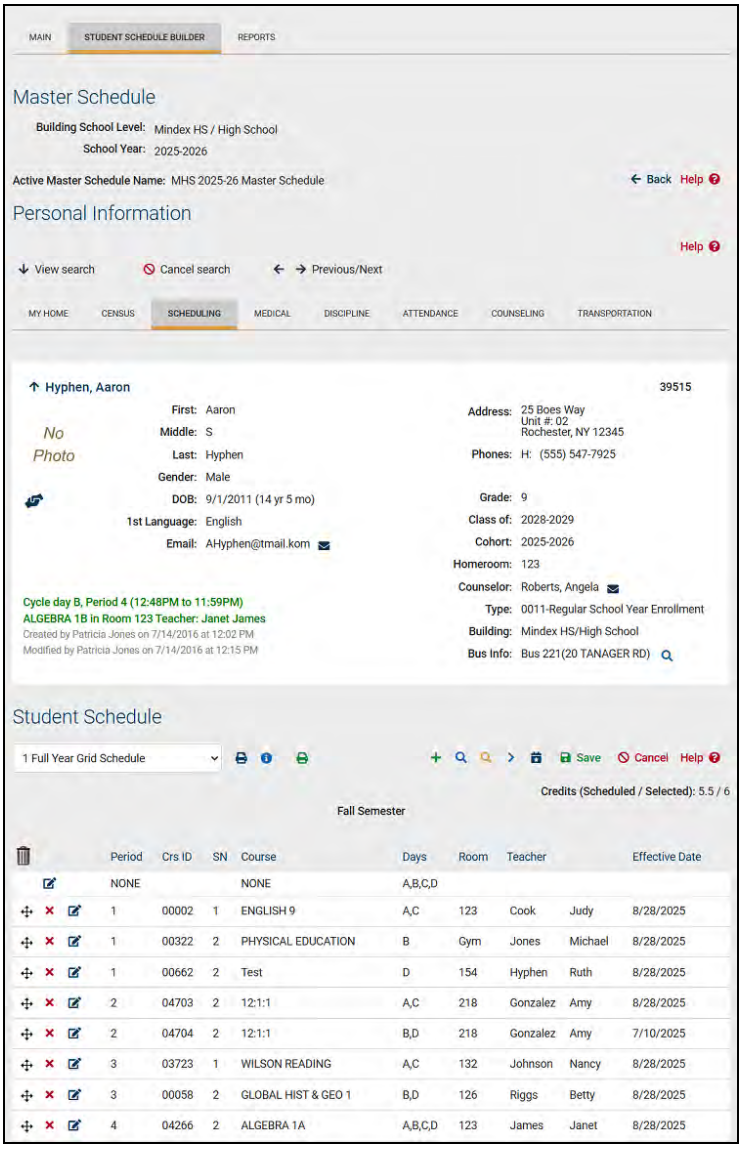
Users may click the Show Sections ↓ to view the details of that course. This will provide the user with a detailed view of all sections of the selected course.



Courses with students placed in them will have buttons to print or show additional details. Users may click the Print icon for a specific section to print schedules for all students in that section. They may also click the Show Students ↓ button to view all students currently assigned to that section.



Users may print a specific student's schedule from this list. Click the Edit Student Schedule button to jump to the selected **Student Record > Student Schedule** tab, where users may make the appropriate changes. To move to the next student in the list, use the navigation buttons at the top of the Student Record, or click the Done ← button to return to the Section Load View.



Conflict Matrix

Suggested use: While building the Master Schedule and before running the Student Schedule Builder

This report shows potential course conflicts, if courses are placed in the same periods, based on student requests. This report does NOT reflect live head-to-head conflicts, as it is typically used to evaluate section placements/period assignments during the creation of the Master Schedule and prior to a Student Schedule run.

The top line of this report shows the course which could have conflicts (e.g., Course #0012 English 10, below). This is followed by an alphabetical list of other courses which students currently have requested in common. The numbers to the right of each conflict row indicate the total number of potential student head-to-head conflicts if sections of these courses are placed in the same period.

In the example below, 222 students have requests for both Course #0012 English 10 and Course #0111 Global Hist & Geo 10. If both courses are scheduled into the same period(s), and there are not enough sections for a student to get one of each in different periods, a conflict will result.

Conflict Matrix

HS : High School : 2010-2011 02/18/2010

0012	English 10	
0111	Global Hist & Geo 10	222
0316	Living Environment	222
0399	Health	222
0645	PE Gr 9/10	222
0235	Geometry	222
0416	French 2	147
0411	Spanish 2	75
0654	Band	45
0653	Orchestra	25
0657	Choir	25

This report automatically appears when selected. There is no pre-screen.

Singleton Conflict Matrix

Suggested use: While building the Master Schedule and before running the Student Schedule Builder

This is a useful report when balancing the period assignments of singleton courses. This report shows where potential singleton conflicts could exist based on student course requests.

The top line of this report shows the singleton course which could have conflicts (e.g., Course #1210 ENGLISH, below). This is followed by an alphabetical list of other singleton courses which students currently have requested in common. The numbers to the right of each conflict row indicate the total number of potential student head-to-head conflicts if these singletons are placed in the same period.

In the example below, 6 students have requests for both Course #1210 ENGLISH and Course #1230 SOCIAL STUDIES & GEO. If both singleton courses

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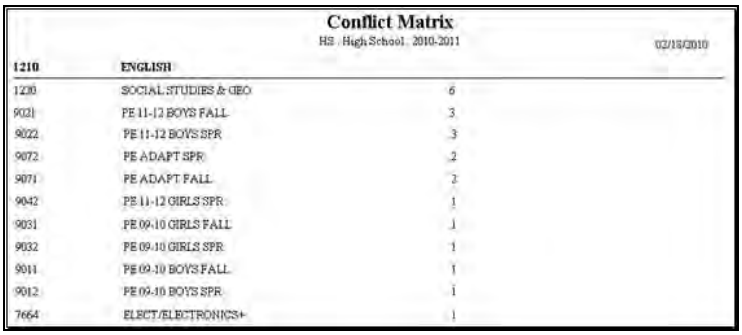
are scheduled into the same period, 5 conflicts will result, and students will only get one of the two courses during a student schedule run.



Conflict Matrix

HS : High School : 2010-2011 02/18/2010

1210	ENGLISH	
1230	SOCIAL STUDIES & GEO	6
9021	PE 11-12 BOYS FALL	3
9022	PE 11-12 BOYS SPR	3
9072	PE ADAPT SPR	2
9071	PE ADAPT FALL	2
9042	PE 11-12 GIRLS SPR	1
9031	PE 09-10 GIRLS FALL	1
9032	PE 09-10 GIRLS SPR	1
9011	PE 09-10 BOYS FALL	1
9012	PE 09-10 BOYS SPR	1
7664	ELECT/ELECTRONICS+	1

This report automatically appears when selected. There is no pre-screen.

Student Schedule Reports

Suggested use: Before building the Master Schedule or after running the Student Schedule Builder

Use these reports to double check student schedules and see exactly which students requested which courses but didn't get them, or just to verify how a student's schedule looks after a schedule run has been performed.

The pre-screen for these reports allows you to select the report you want from a drop-down, as well as giving the user **Search By** (All Students, Per Home Room, Per Grade or By Student) and **Sort By** (Student, Home Room, Counselor, Grade or Zip Code) radio button options:

Note: The options presented in the Report Format drop-down list come from the reports set up by and for the district. For example, your district may have options for each different school level, if multiple school levels are present in

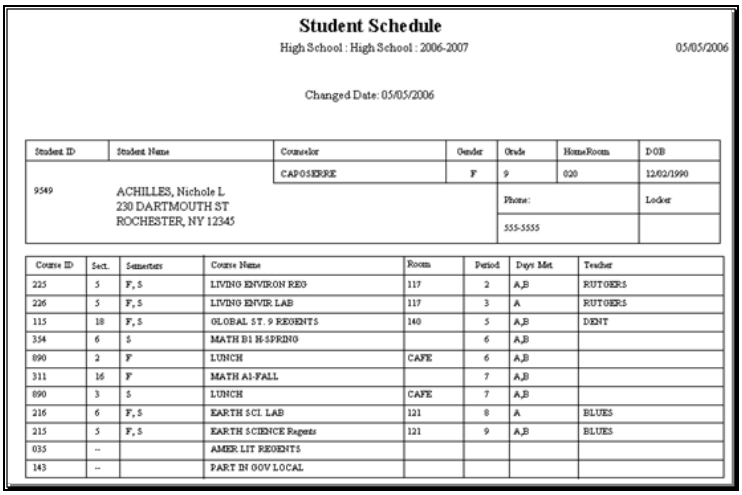
the same building. Other districts may have reports for each marking period instead of just each semester. More information on setting up these reports is available in the *Maintenance User Guide* and in the *Maintenance – Application – Report Format* documentation.

Standard Schedule Report: Displays a full-year schedule for all selected students. You will see the student names appear in the Preview pane of the Crystal Viewer window at the left.

Fall Semester Schedule, Spring Schedule Report (or Other): Displays a fall-only or spring-only (or other marking-period or building-level-only) schedule for all selected students.

Missing Course Selections: Displays schedules for only those students who have one or more selections missing from their schedule.

Grid Schedule RS: Uses Reporting Services to provide a Student Schedule Report with several configurable display options.



Student Schedule

High School : High School : 2006-2007 05/05/2006

Changed Date: 05/05/2006

Student ID	Student Name	Counselor	Gender	Grade	HomeRoom	DOB
9549	ACHILLES, Nichole L 230 DARTMOUTH ST ROCHESTER, NY 12345	CAP05EERE	F	9	020	12/02/1990
				Phone:		Locker
				555-5555		

Course ID	Sect.	Semesters	Course Name	Room	Period	Days Met	Teacher
225	5	F, S	LIVING ENVIRON REG	117	2	A,B	RUTGERS
226	5	F, S	LIVING ENVIR LAB	117	3	A	RUTGERS
115	18	F, S	GLOBAL ST. 9 REGENTS	140	5	A,B	DENT
354	6	S	MATH B1 H-SPRING		6	A,B	
090	2	F	LUNCH	CAFE	6	A,B	
311	16	F	MATH A1-FALL		7	A,B	
090	3	S	LUNCH	CAFE	7	A,B	
216	6	F, S	EARTH SCI. LAB	121	8	A	BLUES
215	5	F, S	EARTH SCIENCE Regents	121	9	A,B	BLUES
035	--		AMER LIT REGENTS				
143	--		PART IN GOV LOCAL				

Note: Some of the items on these reports can be turned on or off with prompts in the Maintenance area. These options include: Locker, Locker Combination, Counselor name, Building Information, Student Information, Address, and Homeroom Teacher Name. Some reports also allow the user to turn these options on or off from within the report itself. Refer to the *Maintenance – Application – Report Format* document for more information.

Students without Course Selections

Suggested use: Before building the Master Schedule

The Students without Course Selections report gives a complete list of all students, in alphabetical order across all grades for the selected building, who do not have any selections made. Use this report to work with individual students and make sure selection requests are made before the Master Schedule Builder is run.

This report automatically appears when selected. There is no pre-screen.

Students without Course Selections

High School : High School : 2007-2008

ID	Name	Grade			
5044	ACHILLES, Adam	12	5220	CAPOSERRE, Elizabeth T	12
3598	ACHILLES, Sara E	12	4331	CAPOSERRE, Erica L	12
9056	AVERILL, John B	10	7260	CAPOSERRE, John P	12
4304	AVERILL, Kyle R	12	4176	CAPOSERRE, Kara	12
4211	AVERILL, William	12	3892	CAPOSERRE, Kevin L	12
4174	BARNES, Andrea L	12	4275	CAPOSERRE, Matthew G	12
101737	BATTAGLINI JR., Frank P	10	3089	CAPOSERRE, Michael A	12
3986	BECK, Aaron M	12	3889	CAPOSERRE, Nathan D	12
4072	BECK, Alexandra L	12	4960	CAPOSERRE, Nicollette P	12
4094	BENTON, Amanda S	12	5113	CAPOSERRE, Pamela S	12
3565	BENTON, Anthony	12	3960	CAPOSERRE, Tanya M	12
3492	BENTON, Bobby L	12	3097	CAPOSERRE, Tiffany N	12
24664	BENTON, Bradley	12	4108	CAROW, Eric	12
4121	BENTON, Corey S	12	4966	CAROW, James E	12
3602	BENTON, David C	12	3799	CAROW, Kathryn	12
4270	BENTON, Gregory	12	3452	CAROW, Mark	12
4022	BENTON, Kathleen	12	4049	CAROW, Nichole E	12

This report displays student grades based on active enrollments:

- If you run the report in the current active school year for next year's master schedule, you will see students listed here in their projected grades. For example a student listed as Grade 9 is in fact currently in Grade 8.
- If you run the report after all grade levels have been advanced, you will see students listed in their actual grades. For example, a student listed as Grade 9 will really be actively enrolled in Grade 9.

  Note: Students only appear on this report if they have **no selections**. If a student has a single selection, even though his selections may not be complete, he will not appear on this report.

Schedule Placement Information Report

Suggested use: After running the Student Schedule Builder

This report shows the percentage break down and actual raw numbers of students who were not scheduled into one or more required and/or elective courses, based on student requests. The report is a summary report showing school level totals at the top of page one, and individual grade totals below. Individual student names are not included here.

The first section of this report shows statistics for the whole building. Subsequent sections break down statistics per grade.

Schedule Placement Information
High School : High School : 2007-2008
10/4/07 5:35 pm

Building	Courses Not Scheduled	# Students Required Classes	Percentage	# Students Elective Classes	Percentage	# Students Required + Elective	Percentage
	0	832	69.39%	747	62.30%	557	46.46%
	1	220	18.35%	339	28.27%	337	28.11%
	2	84	7.01%	89	7.42%	168	14.01%
	3	39	3.25%	21	1.75%	77	6.42%
	4	15	1.25%	3	0.25%	28	2.34%
	5	2	0.17%			16	1.33%
	6	1	0.08%			9	0.75%
	7	3	0.25%			1	0.08%
	8	2	0.17%			1	0.08%
	9	1	0.08%			1	0.08%
	11					3	0.25%
	12					1	0.08%
		1199		1199		1199	

9	Courses Not Scheduled	# Students Required Classes	Percentage	# Students Elective Classes	Percentage	# Students Required + Elective	Percentage
	0	270	88.24%	195	63.73%	177	57.84%
	1	26	8.50%	90	29.41%	91	29.74%
	2	7	2.29%	16	5.23%	26	8.50%
	3	1	0.33%	4	1.31%	8	2.61%
	4	1	0.33%	1	0.33%	2	0.65%
	6					1	0.33%
	7	1	0.33%				
	11					1	0.33%
		306		306		306	

This report automatically appears when selected. There is no pre-screen.

How to read this report:

In the example below, the first row tells us the following:

9	Courses Not Scheduled	# Students Required Classes	Percentage	# Students Elective Classes	Percentage	# Students Required + Elective	Percentage
	0	270	88.24%	195	63.73%	177	57.84%
	1	26	8.50%	90	29.41%	91	29.74%

- 26 ninth-grade students are missing 1 required class which they had requested, representing 8.5% of ninth graders
- 90 ninth-grade students are missing 1 elective class which they had requested, representing 29.41% of ninth graders
- 91 ninth-grade students are missing 1 required class AND 1 elective class, representing 29.74% of ninth graders

Students with Missing Courses Report

Suggested use: After running the Student Schedule Builder

This report is a list of students whose schedules are missing one or more courses based on their requests. The report starts by showing those missing only one course and progresses until the last page shows those missing the most courses.

This report automatically appears when selected. There is no pre-screen.

Students with Missing Course(s)

High School : High School : 2007-2008 10/04/2007

Student ID	Student Name	Grade
Missing 5 Course(s)		
49663	Bonner, Kathryn	12
51714	Brown, Patrick Peter	12
50198	Jake, Rachael	12
51693	King, Ryan	12
51756	Moore, Ramachandra	12
51943	Moose, Laura	12
54679	Thomas, Kuldeep	12
51427	Boyd, Broderick R	11
49493	Gonzalez, Hannah	11
49000	More, Brendan	11
62932	Ramirez, Khyle Subin	11
51689	Bonner, Jordan	10
64450	Bonner, Stanford J	10
51339	Forcier, Caitlin E	10
65549	Marssall, Christian A	10
65158	Pots, Carson W	10
Total Students Missing 5 Course(s): 16		
Missing 6 Course(s)		
52123	Bonner, Michael Thomas	12
54210	Button, Francisca	12
50013	Tayton, Katharine L	12
49334	Hall, Patrice	11
48079	More, Cassandra	11
65146	Taylor, Alexandra C	11
66273	Moore, Priscilla F	10
52779	Smith, Robin J.P.	10
64392	Jonson, Filishia L	9
Total Students Missing 6 Course(s): 9		

Note:To see what courses these students did not get, use the Student Schedule Report – Missing Course Selections and the *Not Scheduled Student Course Selection Report*.

Students Missing Lunch

Suggested use: After running the Student Schedule Builder

The Students Missing Lunch report is an easy way to quickly determine which students have not been scheduled for a lunch, after a run including lunches has been performed. This report is a full list of all students, in grade order, that have not been scheduled for a lunch.

The Requested column depicts whether the student should have gotten lunch (an X indicates it was requested) or not (no X indicates the Do Not Schedule Lunch option was selected in the student course selection area). Students who did not request lunch, and thus would not have been scheduled for lunch, will also appear on this report.

This report automatically appears when selected. There is no pre-screen.

Students Missing Lunch 02/23/2006 4:07:40 PM

High School : High School : 2005-2006

Student	StudentID	Grade	Homeroom	Team	Requested	Student	StudentID	Grade	Homeroom	Team	Requested
AVERILL, Anthony	5232	9			X	BUCKINGHAM, Shane	4495	10	CAFE		X
AVERILL, Deanna	5479	9	201		X	BUCKINGHAM, Tyler	4207	10	237		
AVERILL, Kayla	4803	9	105		X	BURKHART, Matthew	4073	10	CAFE		X
AVERILL, Michael	4957	9	145			CAPOSERRE, Marielena	6531	10	117		X
AVERILL, Pamela	5461	9	145		X	CEDIARS, Amanda	4423	10	239		
BARNES, Mindy	4414	9	132		X	CEDIARS, Brittany	4695	10	122		
BECK, Ashley	9789	9	127		X	CLAUDIA, Gregory	4364	10	CAFE		
BERKSHIRE, Jeremy	5555	9	119		X	CURTIS, Christopher	4319	10	CAFE		X
Black, Joe	101330	9			X	CURTIS, Kristy	4441	10	CAFE		X
BRYANS, Gary	5934	9	133		X	CURTIS, Sean	4488	10	CAFE		X
BUCKINGHAM, Alyssa	6544	9	133		X	DANGERFIELD, Edward	4047	10	132		X
BURKHART, Heather	9672	9	105		X	DANGERFIELD, Elizabeth	4555	10	237		X
CAPOSERRE, Stephen	4915	9	134		X	DANGERFIELD, Millicent	5240	10	237		X
DANGERFIELD, Ashley	5223	9	132		X	DUNCAN, Nicholas	4553	10	240		X
DANGERFIELD, Devon	4739	9	132		X	ELEFANTE, Thomas	3954	10	237		X
DANGERFIELD, Samantha	4653	9			X	ELEFANTE, William	5525	10	237		X
EISENHOWER, Katie	4927	9	204		X	GARDINER, Nicole	4432	10	CAFE		X
ELEFANTE, Dylan	4608	9	131		X	GARDINER, Nicole	5474	10	CAFE		X
GARDINER, Roberto	4762	9	202		X	GARDINER, Robert	4465	10	CAFE		X
GARFEILD, Paul	10053	9	201		X	GARRSON, Dustin	5322	10	124		
GARFEILD, Stephanie	9808	9	134		X	GIFFORD, Madeleine	4080	10	123		
GOEBEL, Christopher	22342	9	203		X	GOEBEL, Dana	4632	10	CAFE		X
GOEBEL, Shanil	4745	9	203		X	GOEBEL, Justin	4688	10	237		X
GREGORY, Joseph	4878	9	104			GOODMAN, Deliberate	7302	10	239		
HARVARD, Henrik	4575	9	145		X	HARVARD, Kathyn	4112	10	122		
LYONS, Samantha	23003	9	104		X	HERNON, Stefanie	4646	10	CAFE		X

Note: If the Lunch course is designated as a Course Type of **Neither** in the Course Catalog, then this report will show every student as Missing Lunch, regardless of whether they actually were scheduled into a lunch section or not. This is because the Course Type of Neither ignores the SchoolTool Lunch logic, which tries to give every student a lunch unless specifically designated not to.

Student Course Selection with Courses Information

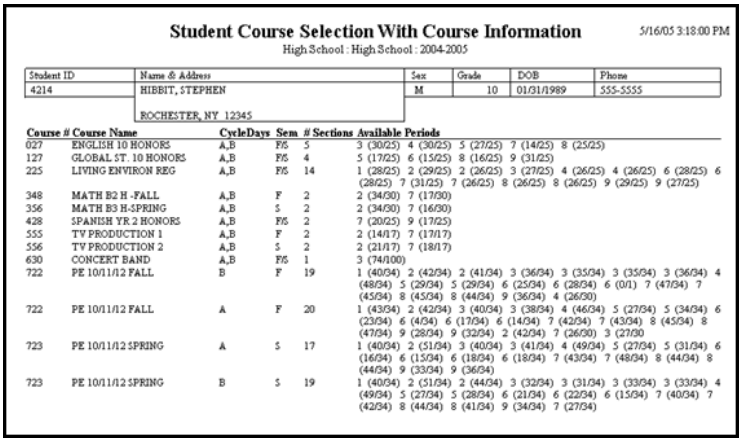
Suggested use: After running the Student Schedule Builder

The Student Course Selection with Courses Information report uses a simple or advanced search to find a student; the report then lists all selections just for that student. This can be used to review with guidance counselors to ensure students are meeting the minimum requirements for graduation.

Details on the report include the student ID, student name and address, gender, grade, date of birth and home phone, along with all selections. Selections include course #, course name, cycle days and semesters, total number of available sections, and alternate periods when the course is offered.

Note: if your search yields a single student, the report will open automatically for that student. If your search yields a list, the report will open for a single student after you have selected a student from the list. There is no way to generate this report for multiple students at a time.

Note: The **Available Periods** column displays all periods where this course is available, as well as current headcounts for each period. For example, for English 10 Honors, there are 5 sections, and the first one in period 3 currently has 30 students scheduled into it, even though the max head count is 25.



Student Course Selection With Course Information 5/16/05 3:18:00 PM

High School : High School : 2004-2005

Student ID	Name & Address	Sex	Grade	DOB	Phone
4214	HIBBIT, STEPHEN ROCHESTER, NY 12345	M	10	01/31/1989	555-5555

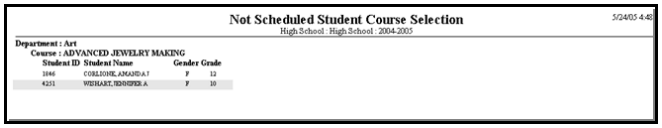
Course #	Course Name	CycleDays	Sem	# Sections	Available Periods
027	ENGLISH 10 HONORS	A,B	F/S	5	3 (30/25) 4 (30/25) 5 (27/25) 7 (14/25) 8 (25/25)
127	GLOBAL ST. 10 HONORS	A,B	F/S	4	5 (17/25) 6 (15/25) 8 (16/25) 9 (31/25)
225	LIVING ENVIRON REG	A,B	F/S	14	1 (28/25) 2 (29/25) 2 (26/25) 3 (27/25) 4 (26/25) 4 (26/25) 6 (28/25) 6 (28/25) 7 (31/25) 7 (26/25) 8 (26/25) 8 (26/25) 9 (29/25) 9 (27/25)
348	MATH B2 H -FALL	A,B	F	2	2 (34/30) 7 (17/30)
356	MATH B3 H-SPRING	A,B	S	2	2 (34/30) 7 (16/30)
428	SPANISH YR 2 HONORS	A,B	F/S	2	7 (20/25) 9 (17/25)
555	TV PRODUCTION 1	A,B	F	2	2 (14/17) 7 (17/17)
556	TV PRODUCTION 2	A,B	S	2	2 (21/17) 7 (18/17)
630	CONCERT BAND	A,B	F/S	1	3 (74/100)
722	PE 10/11/12 FALL	B	F	19	1 (40/34) 2 (42/34) 2 (41/34) 3 (36/34) 3 (35/34) 3 (35/34) 3 (36/34) 4 (48/34) 5 (29/34) 5 (29/34) 6 (25/34) 6 (28/34) 6 (0/1) 7 (47/34) 7 (45/34) 8 (45/34) 8 (44/34) 9 (36/34) 4 (26/30)
722	PE 10/11/12 FALL	A	F	20	1 (43/34) 2 (42/34) 3 (40/34) 3 (38/34) 4 (46/34) 5 (27/34) 5 (34/34) 6 (23/34) 6 (4/34) 6 (17/34) 6 (14/34) 7 (42/34) 7 (43/34) 8 (45/34) 8 (47/34) 9 (28/34) 9 (32/34) 2 (42/34) 7 (26/30) 3 (27/30
723	PE 10/11/12 SPRING	A	S	17	1 (40/34) 2 (51/34) 3 (40/34) 3 (41/34) 4 (49/34) 5 (27/34) 5 (31/34) 6 (16/34) 6 (15/34) 6 (18/34) 6 (18/34) 7 (43/34) 7 (48/34) 8 (44/34) 8 (44/34) 9 (33/34) 9 (36/34)
723	PE 10/11/12 SPRING	B	S	19	1 (40/34) 2 (51/34) 2 (44/34) 3 (32/34) 3 (31/34) 3 (33/34) 3 (33/34) 4 (49/34) 5 (27/34) 5 (28/34) 6 (21/34) 6 (22/34) 6 (15/34) 7 (40/34) 7 (42/34) 8 (44/34) 8 (41/34) 9 (34/34) 7 (27/34)

Not Scheduled Student Course Selection Report

Suggested use: After running the Student Schedule Builder

This report shows, by course, which students did not get their requested courses. Specific student names are also listed. Use this list to help resolve conflicts. The information here may indicate students who had too many selections to begin with.

1. Select the **Not Scheduled Student Course Selection**report from the list of Master Schedule reports.
2. Select the appropriate radio button:
    A. All for all courses.
    B. Course for a specific course or all courses in a department.
3. Click once on the **Run Report**button to generate the report. The report will appear in a separate report viewer window.



Not Scheduled Student Course Selection 5/24/05 4:48

High School : High School : 2004-2005

Department : Art

Course : ADVANCED JEWELRY MAKING

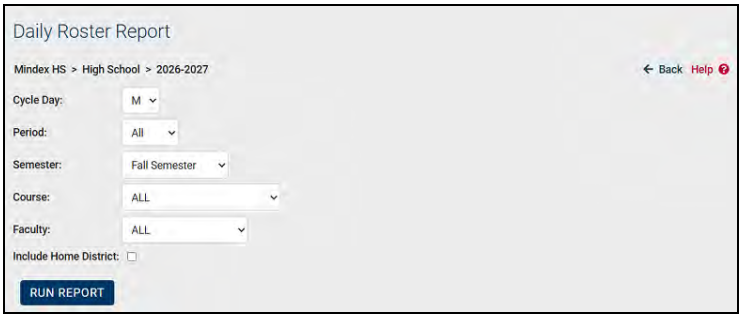
Student ID	Student Name	Gender	Grade
1046	CORLIONE, AMANDA J	F	12
4251	WEHART, HONOREE A	F	10

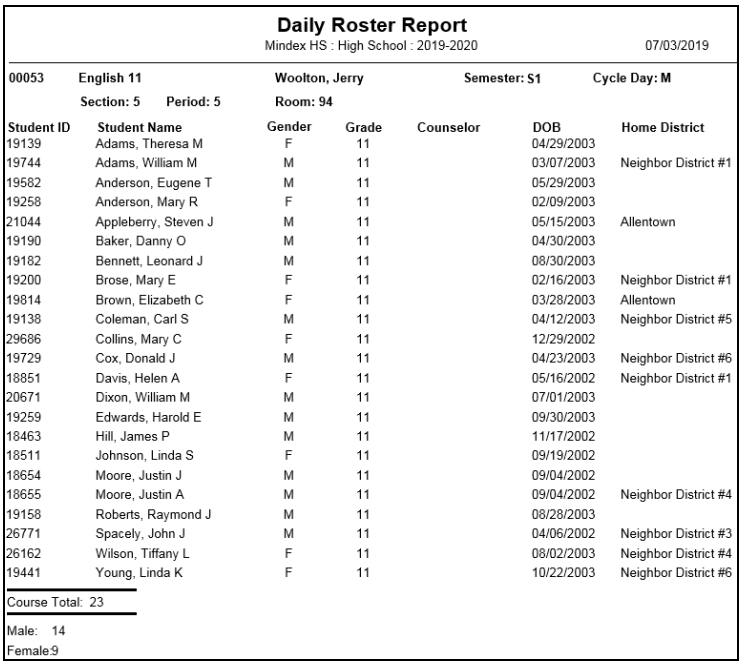
Daily Roster Report

Suggested use: After running the Student Schedule Builder

The Daily Roster Report provides a convenient way to print class rosters. The rosters are printed in order of class section, and can be printed for individual teachers, courses, semester, periods, or cycle days.

A prescreen allows users to choose a number of different criteria, in a number of different ways, making it easy to choose, for instance, only Mr. Goodman's English 10H classes on A days of semester 1. You may also leave some of these fields blank, so all of Mr. Goodman's classes can be printed, or all Semester 1 A day courses for any teacher. To view Supplemental Courses, select "NONE" in the Period drop-down menu.





Daily Roster Report

Mindex HS : High School : 2019-2020 07/03/2019

00053 English 11 Woolton, Jerry Semester: S1 Cycle Day: M

Section: 5 Period: 5 Room: 94

Student ID	Student Name	Gender	Grade	Counselor	DOB	Home District
19139	Adams, Theresa M	F	11		04/29/2003	
19744	Adams, William M	M	11		03/07/2003	Neighbor District #1
19582	Anderson, Eugene T	M	11		05/29/2003	
19258	Anderson, Mary R	F	11		02/09/2003	
21044	Appleberry, Steven J	M	11		05/15/2003	Allentown
19190	Baker, Danny O	M	11		04/30/2003	
19182	Bennett, Leonard J	M	11		08/30/2003	
19200	Brose, Mary E	F	11		02/16/2003	Neighbor District #1
19814	Brown, Elizabeth C	F	11		03/28/2003	Allentown
19138	Coleman, Carl S	M	11		04/12/2003	Neighbor District #5
29686	Collins, Mary C	F	11		12/29/2002	
19729	Cox, Donald J	M	11		04/23/2003	Neighbor District #6
18851	Davis, Helen A	F	11		05/16/2002	Neighbor District #1
20671	Dixon, William M	M	11		07/01/2003	
19259	Edwards, Harold E	M	11		09/30/2003	
18463	Hill, James P	M	11		11/17/2002	
18511	Johnson, Linda S	F	11		09/19/2002	
18654	Moore, Justin J	M	11		09/04/2002	
18655	Moore, Justin A	M	11		09/04/2002	Neighbor District #4
19158	Roberts, Raymond J	M	11		08/28/2003	
26771	Spacely, John J	M	11		04/06/2002	Neighbor District #3
26162	Wilson, Tiffany L	F	11		08/02/2003	Neighbor District #4
19441	Young, Linda K	F	11		10/22/2003	Neighbor District #6

Course Total: 23

Male: 14
Female:9

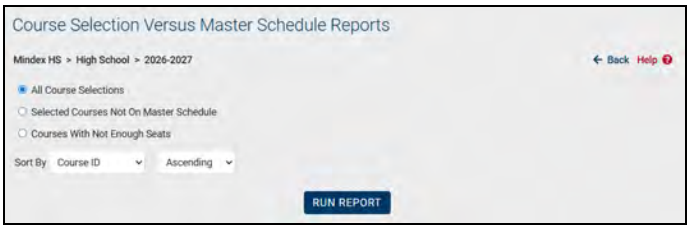
Course Selections Versus Master Schedule Reports

Suggested use: Before building the Master Schedule and before running the Student Schedule Builder

The Course Selections Versus Master Schedule reports show students' course selections cross referenced to the Master Schedule in several different ways. Use this information to verify that there are enough seats to meet student requests, to confirm that classes that were requested will still be offered, and to understand what approximate percentage of student requests will not be met (ie, where a class only has 50 available seats, but 65 students have requested it).

Through the pre screen, there are three reports that can be printed from this report option:

- All Course Selections
- Selected Courses Not On Master Schedule
- Courses With Not Enough Seats

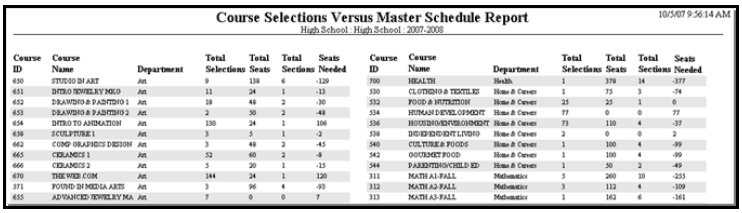


In addition, users may organize the information in the report using the **Sort By** drop-downs:

- Choose from the first drop-down: Course ID, Courses Name, Department, Total Selections, Total Seats, Total Sections or Seats Needed.
- Choose Ascending or Descending order from the second drop-down.

All Course Selections:

This report shows you the course ID, course name, department, total number of requests (selections), total number of seats, and total number of sections. The report is formatted in column style, with two (2) columns per page.



Course Selections Versus Master Schedule Report

10/5/07 9:56:14 AM

High School : High School : 2007-2008

Course ID	Course Name	Department	Total Selections	Total Seats	Total Sections	Seats Needed
650	STUDIO IN ART	Art	9	138	6	-129
651	INTRO JEWELRY MKG	Art	11	24	1	-13
652	DRAWING & PAINTING 1	Art	18	48	2	-30
653	DRAWING & PAINTING 2	Art	2	50	2	-48
654	INTRO TO ANIMATION	Art	130	24	1	106
658	SCULPTURE 1	Art	3	5	1	-2
662	COMP GRAPHICS DESIGN	Art	3	48	2	-45
665	CERAMICS 1	Art	52	60	2	-8
666	CERAMICS 2	Art	5	20	1	-15
670	THE WEB .COM	Art	144	24	1	120
671	FOUND IN MEDIA ARTS	Art	3	96	4	-93
655	ADVANCED JEWELRY MA	Art	7	0	0	7

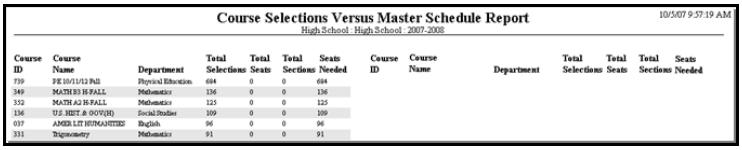
Course ID	Course Name	Department	Total Selections	Total Seats	Total Sections	Seats Needed
700	HEALTH	Health	1	378	14	-377
530	CLOTHING & TEXTILES	Home & Career	1	75	3	-74
532	FOOD & NUTRITION	Home & Career	25	25	1	0
534	HUMAN DEVELOPMENT	Home & Career	77	0	0	77
536	HOUSING/ENVIRONMENT	Home & Career	73	110	4	-37
538	INDEPENDENT LIVING	Home & Career	2	0	0	2
540	CULTURE & FOODS	Home & Career	1	100	4	-99
542	GOURMET FOOD	Home & Career	1	100	4	-99
544	PARENTING/CHILD ED	Home & Career	1	50	2	-49
311	MATH A1-FALL	Mathematics	5	260	10	-255
312	MATH A2-FALL	Mathematics	3	112	4	-109
313	MATH A3-FALL	Mathematics	1	162	6	-161

Note: a negative number in the **Seats Needed** column indicates that there are more seats available than are necessary to meet student requests.

Selected Courses Not On Master Schedule:

The details in this view of the report show courses that students have requested which do not have any corresponding sections on the master schedule (ie, Total Seats and Total Sections columns will display zeros).

This could indicate courses which were selected in error, or left over requests for courses no longer being offered. To clean up the report, you could either remove course requests or add sections.



Course Selections Versus Master Schedule Report 10/5/07 9:57:19 AM

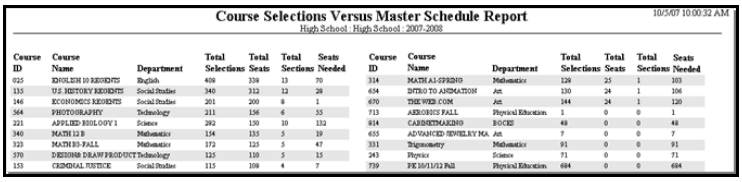
High School : High School : 2007-2008

Course ID	Course Name	Department	Total Selections	Total Seats	Total Sections	Seats Needed	Course ID	Course Name	Department	Total Selections	Total Seats	Total Sections	Seats Needed
739	PE 10/11/12 Fall	Physical Education	684	0	0	684							
349	MATH 93 H-FALL	Mathematics	136	0	0	136							
352	MATH A2 H-FALL	Mathematics	125	0	0	125							
136	U.S. HIST. & GOVT(H)	Social Studies	109	0	0	109							
037	AMER LIT HUMANITIES	English	96	0	0	96							
331	Trigonometry	Mathematics	91	0	0	91							

Courses With Not Enough Seats:

The details in this view of the report show courses with more requests than there are seats in the current sections on the master schedule. This could indicate that more sections are needed, or can be used to troubleshoot courses which will not be fully scheduled based on requests.

This report will also display those courses not on the Master Schedule, so this report is really a combination of courses without enough seats and selected courses not on the master schedule.



Course Selections Versus Master Schedule Report 10/5/07 10:00:32 AM

High School : High School : 2007-2008

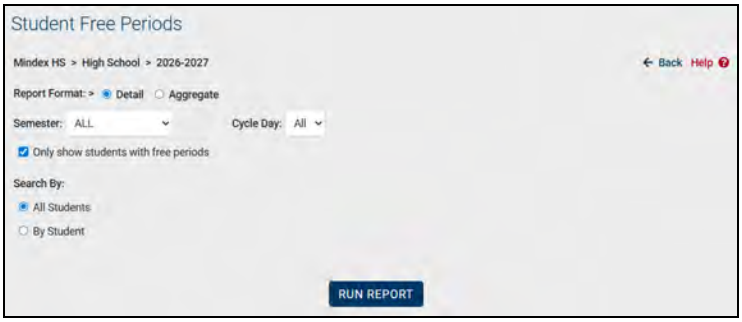
Course ID	Course Name	Department	Total Selections	Total Seats	Total Sections	Seats Needed	Course ID	Course Name	Department	Total Selections	Total Seats	Total Sections	Seats Needed
025	ENGLISH 10 REGENTS	English	408	338	13	70	314	MATH A1-SPRING	Mathematics	128	25	1	103
135	U.S. HISTORY REGENTS	Social Studies	340	312	12	28	654	INTRO TO ANIMATION	Art	130	24	1	106
146	ECONOMICS REGENTS	Social Studies	201	200	8	1	670	THE WEB COM	Art	144	24	1	120
564	PHOTOGRAPHY	Technology	211	156	6	55	713	AEROBICS FALL	Physical Education	1	0	0	1
221	APPLIED BIOLOGY 1	Science	282	150	10	132	814	CABINETMAKING	BOCES	48	0	0	48
340	MATH 12 B	Mathematics	154	135	5	19	655	ADVANCED JEWELRY MA	Art	7	0	0	7
323	MATH B3-FALL	Mathematics	172	125	5	47	331	Trigonometry	Mathematics	91	0	0	91
570	DESIGN& DRAW PRODUCT	Technology	125	110	5	15	243	Physics	Science	71	0	0	71
153	CRIMINAL JUSTICE	Social Studies	115	108	4	7	739	PE 10/11/12 Fall	Physical Education	684	0	0	684

Student Free Periods Report

Suggested use: After running the Student Schedule Builder

The Student Free Periods report returns a list of all students that do not have anything scheduled for some portion of the day. A study hall or lunch is not considered a free period. Students on this list are missing something from their schedule (this may be a study hall) which should be addressed.

The pre-screen for this report provides options that control the way data is returned in this report.



Options available on this pre-screen are as follows:

- **Report Format:** Determines which format you want to use for the report. See the examples below for more information.
    - Detail Report displays the actual number of cycle days free for each period for each individual student
    - Aggregate Report displays a summary version of the information, It displays a separate grid for each cycle day for all grades, cycle days, and building school levels.
- **Semester:**This drop-down list is used to specify whether you want to view data from one or all semesters.
- **Cycle Day:**This drop-down list is used to specify whether you want to view data for one or all cycle days.
- **Only show students with free periods** : This checkbox is only available when the Detail report format is selected, and is used to narrow the list of students to only show those with free periods in the selected semester(s) and/or cycle day(s).
- Search By:
    - Selecting the “All Students” option will return all students who meet the specified criteria.
    - Selecting the “By Student” option allows you to limit the report data by using the Batch Selector to locate one or more student, based on your specified search criteria.

Detail Report Format

The Detail Report shows data in a single table, listing the number of cycle days each student has for each period on an individual student basis. Totals are shown at the bottom of each column (or, if the report spans multiple pages, totals appear on the last page). The report data is listed alphabetically by individual students.

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Student Free Period Report

High School : High School : 2007-2008

Semester: Fall

	1	Blck A	2	3	4	5	6	7	8
Allen, Georgia	5			1	1	6	6	5	5
Allen, La'Brea I			1	1	2	1	3		
Allyne, Alexandra				1	2	5	1		1

Aggregate Report Format

The Aggregate Report displays each cycle day separately for all grades, cycle days, and Building School Levels. The format is very similar to the Seats Per Period Per Grade report, but this Aggregate Report counts **free** students. Totals are displayed at the bottom of each column. The Class Size is shown in the last column of each table.

Student Free Period Report 10/5/07

High School : High School : 2007-2008 : Fall

Period	Number of Students Free	Number of Students Not Free
1	29	1,169
2	34	1,164
3	62	1,136
4	91	1,107
5	145	1,053
6	102	1,096
7	57	1,141
8	76	1,122

Faculty Free Periods Report

Suggested use: After running the Student Schedule Builder

Much like the Student Free Periods report, this report helps to show what periods teachers have not been scheduled. Like the Student Free Periods report, we can look at all teachers, or a specific individual. We also can see a grid format detail for all teachers, or a summary (Aggregate).

When the “Respect Faculty Duties” option is checked, faculty will not be shown as “free” on either version of this report during periods in which they are assigned a faculty duty.

The Detail report prints in a grid format, and allows you to see which specific cycle days within each period each faculty is free:

Faculty Free Periods Report
By Cycle Day
High School : High School : 2007-2008 : Fall

	1	2	3	4	5	6	7	8
Singh, Jed	2	3	1	1,2,3,4,5	1,2,3,4,5,6	3	6	1,2,3,4,5,6
Whitehead, Debra	6	6	1,2,3,4,5,6	2	4	1,2,3,4,5,6	1,2,3,4,5,6	5
Yutzy, Ann	5	3	5	3	1,2,3,4,5,6	2	1,2,3,4,5,6	1,2,3,4,5,6

The Aggregate report is shown below. Notice only periods and totals of faculty free or not free display, but not which cycle day(s):

Faculty Free Period Report 10/5/07

High School : High School : 2007-2008 : Fall

Period	Number of Faculty Free	Number of Faculty Not Free
1	97	21
2	95	23
3	96	22
4	98	20
5	101	17
6	98	20
7	96	22
8	98	20

Student Conflict Report

Suggested use: After running the Student Schedule Builder

Like the conflict matrix, this report shows head to head selection conflicts in a graphical representation, and gives users options for reviewing singletons, singletons and doubletons, singletons, doubletons and tripletons, and singletons, doubletons, tripletons and quadrupletons. This includes all labs that are linked to core courses.

Singleton conflict example:

If a student requests a course that is only offered in period 8 and another course that is also only offered in period 8 there is a singleton conflict:

Name	Period	Course	Conflict
Student A	8	C++	Head to head singleton conflicts
Student A	8	ACCTG	Two needed courses in same timeslot

Doubleton conflict example:

If a student requests a singleton in period 8 and a doubleton offered in periods 6 and 8, the 6th period selection becomes a singleton conflict by nature:

Name	Period	Course	Conflict
Student A	8	C++	Doubleton conflict
Student A	8	ACCTG	3 needed courses in 2 available timeslots
Student A	6	ACCTG	
Student A	6	AP PE	

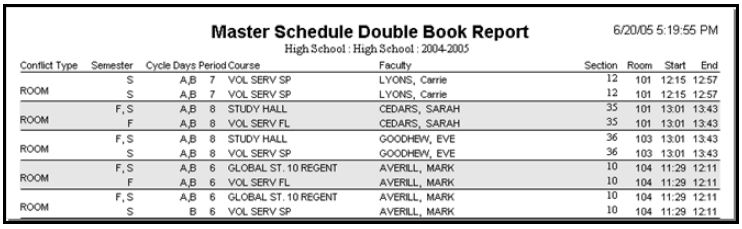
And so on with Tripletons etc.....

Double Book Report

Suggested use: Before running the Student Schedule Builder

This report shows which rooms and teachers have been double booked. If you have used SchoolTool to build the Master Schedule, double booking is not allowed, and this report may not be useful. However, if you have created your own Master Schedule, this report is a useful trouble-shooting tool for resolving conflicts.

Select the Double Book Report from the list of Master Schedule reports. The report will appear.



Master Schedule Double Book Report 6/20/05 5:19:55 PM

High School : High School : 2004-2005

Conflict Type	Semester	Cycle Days	Period	Course	Faculty	Section	Room	Start	End
ROOM	S	A,B	7	VOL SERV SP	LYONS, Carrie	12	101	12:15	12:57
	S	A,B	7	VOL SERV SP	LYONS, Carrie	12	101	12:15	12:57
ROOM	F, S	A,B	8	STUDY HALL	CEDARS, SARAH	35	101	13:01	13:43
	F	A,B	8	VOL SERV FL	CEDARS, SARAH	35	101	13:01	13:43
ROOM	F, S	A,B	8	STUDY HALL	GOODHEW, EVE	36	103	13:01	13:43
	S	A,B	8	VOL SERV SP	GOODHEW, EVE	36	103	13:01	13:43
ROOM	F, S	A,B	6	GLOBAL ST. 10 REGENT	AVERILL, MARK	10	104	11:29	12:11
	F	A,B	6	VOL SERV FL	AVERILL, MARK	10	104	11:29	12:11
ROOM	F, S	A,B	6	GLOBAL ST. 10 REGENT	AVERILL, MARK	10	104	11:29	12:11
	S	B	6	VOL SERV SP	AVERILL, MARK	10	104	11:29	12:11

Note: Room conflicts come first (if any), followed by faculty conflicts. It is possible to see some duplication if a single teacher is double booked in the same room and period.

Note: the type of conflict (room or faculty) is noted in the far left column under Conflict type, and the details of the conflict are reflected in that row.

Credits Requested vs Credits Received Report

Suggested use: After running the Student Schedule Builder

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This report provides a quick glance at all student requests to assist in determining what students have too few (or too many) course requests, and which students did not receive all of the credits that they requested.

Note: This report is only useful for school levels with credit-bearing courses, such as the high school, or a middle school with many accelerated courses (such as Earth Science).

This report has five columns:

- **Student Name:**The full name, directory style, of every student with course requests.
- **Grade:**The grade level of the student. This is the primary sort row for this report.
- **Credits Requested:**This represents the number of transcript credits, as defined in the Course Catalog, the student has requested/selected.
- **Credits Received:** The number of credits the student is currently scheduled for. With an ideal schedule, all perfectly scheduled students will be scheduled for the same number of credits that they requested.
- **Difference:**The difference between the number of credits a student requested and the number of credits a student received. A perfectly scheduled student would have a zero in this column. This is the secondary sort column.

Credits Requested vs. Received Report 10/5/07

High School : High School : 2007-2008

Student Name	Grade	Credits Requested	Credits Received	Difference
Grade 9				
Lee, Sarina	9	7.50	0.00	7.50
Thompson, Michele'	9	2.00	5.50	3.50
Gabaldon, Zachary	9	2.50	5.50	3.00
Allyne, Yun Qing	9	5.50	7.50	2.00
Hanzke, Bowzanigan	9	8.50	6.50	2.00

This report automatically appears when selected. There is no pre-screen.

This report displays student grades based on active enrollments:

- If you run the report in the current active school year for next year's master schedule, you will see students listed here in their projected grades. For example a student listed as Grade 9 is in fact currently in Grade 8.
- If you run the report after all grade levels have been advanced, you will see students listed in their actual grades. For example, a student listed as Grade 9 will really be actively enrolled in Grade 9.

Projected Seats Per Period Per Grade Report

Suggested use: After running the Master Schedule Builder.

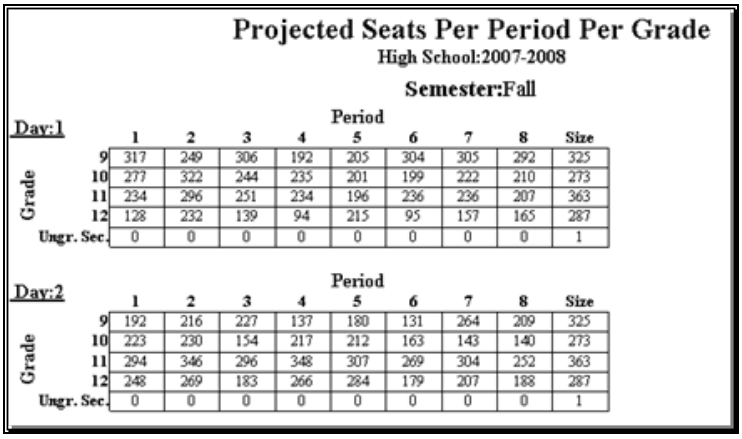
Select your desired report from the prescreen selection for the two versions of the report.

Projected:

When the Projected option is selected for this report, it provides an estimate of available seats per cycle day, per period for each grade level, based on student course requests and actual seats across all sections of all courses in the Master Schedule. This estimate is based on the ratio of student's course selections in each grade for each course section that is available every period and cycle day.

At the end of each grade level row is a total that indicates the size or number of students in that grade.

The Projected version of this report can be used to help ensure that you have enough projected seats per period student is busy. If you do not have enough seats in a particular cycle day-period combination, this may indicate that you need to add study halls or additional course sections in that period.



Projected Seats Per Period Per Grade

High School:2007-2008

Semester:Fall

Day:1

Grade	Period 1	2	3	4	5	6	7	8	Size
9	317	249	306	192	205	304	305	292	325
10	277	322	244	235	201	199	222	210	273
11	234	296	251	234	196	236	236	207	363
12	128	232	139	94	215	95	157	165	287
Ungr. Sec.	0	0	0	0	0	0	0	0	1

Day:2

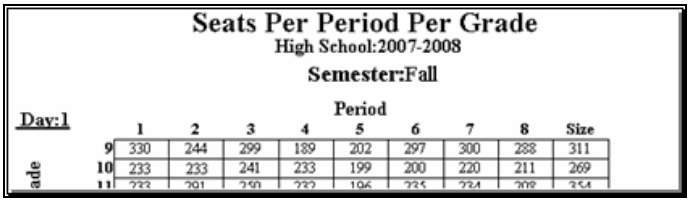
Grade	Period 1	2	3	4	5	6	7	8	Size
9	192	216	227	137	180	131	264	209	325
10	223	230	154	217	212	163	143	140	273
11	294	346	296	348	307	269	304	252	363
12	248	269	183	266	284	179	207	188	287
Ungr. Sec.	0	0	0	0	0	0	0	0	1

Actual:

This variation of the report that displays actual seat counts for all grade levels and for all periods of the day. This variation of the report has two options, both of which are checked by default:

- Include Lunches: This will include lunches in the current seat count. When enabled, all students currently schedule for a SchoolTool lunch (as defined in the Course Catalog) will be counted.
- Include Study Halls: This will include study halls in the current seat count. When enabled, all students schedule for a SchoolTool study hall (as defined in the Course Catalog) will be counted.

  This report displays actual seat count information (the number of students that have courses scheduled during the specified times).



Seats Per Period Per Grade
High School:2007-2008
Semester:Fall

Day:1

Grade	Period 1	2	3	4	5	6	7	8	Size
9	330	244	299	189	202	297	300	288	311
10	233	233	241	233	199	200	220	211	269
11	233	291	250	232	196	235	234	208	354

Backups Tab

The Backups tab contains all saved backup copies of inactive master schedules. When a backup is restored, it becomes the active master schedule and is removed from this list.

For additional information on how backups are created, refer to the section on Making a Backup.

Restoring a Backup

There are several things you may want to keep in mind when it comes to restoring copies of your Master Schedule. Points to consider before restoring a master schedule backup:

- Whenever you restore a backup, that restored item no longer appears in the list of restorable Master Schedules. This may help us keep the clutter down, but we will not be able to again return to this backup copy unless we again click on the “Save Copy” button.
- Whenever you restore a backup of your Master Schedule, the current Master Schedule is backed up, to save us from accidentally restoring an old copy on top of your current schedule. Because of this, you may want to get in the habit of always renaming your restored Master Schedule to something more appropriate after you have restored it.

To restore a previously saved copy of your Master Schedule:

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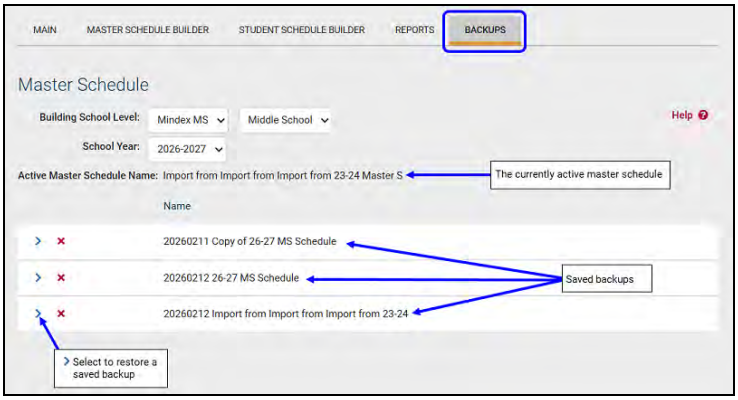
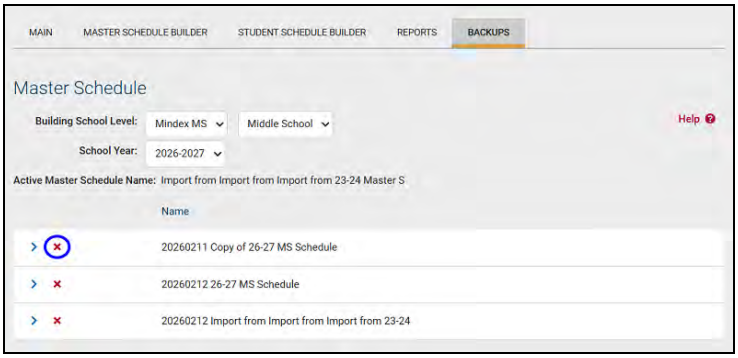
1. Click on the Backups tab from within the Master Schedule sub-module.



2. Click on the Select ❯button next to the Master Schedule you would like to restore.
3. After a moment, the screen will refresh with several changes:
    - The name of the “restore point” will now be displayed as the Active Master Schedule Name.
    - The Master Schedule you just replaced didn’t go away, it is now listed in the list of possible restore names. If we made a mistake, we can easily go back again!
    - The Master Schedule we just restored no longer appears in the list. If we want to add it again to the list, we would follow the instructions above for making a backup.

Deleting a Backup

Occasionally it may be necessary to delete a backup from this area. The ability to delete backups is permission-based, so not all users will be able to perform this action. Users who have the appropriate permissions will see a Delete ✖ button in each row.



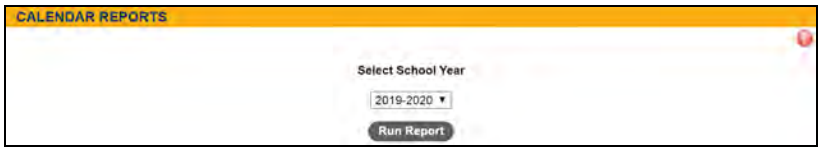
A. To delete a backup, click the Delete ✖button in the appropriate row.
B. A warning message will appear. Click OK to confirm the action and continue.

   Note: All information contained within the selected backup will be removed, including teacher and student schedule assignments, course sections, and constraints. This action cannot be undone.

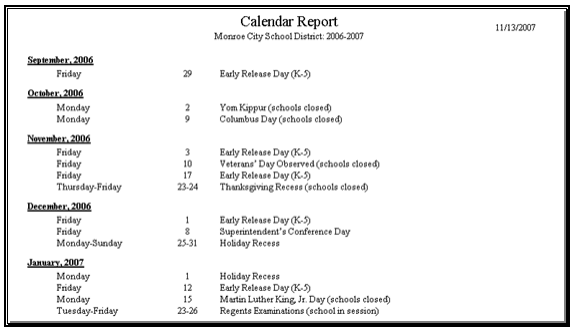
C. After clicking OK, the backup will be deleted. This may take several minutes, as there may be a significant of related information to be deleted during this process.

Scheduling > Calendar Report

The Calendar Report allows you to generate a list of all event days you have listed in your school calendar, such as Superintendent days, holidays, school closures, etc.



1. From within the Scheduling module, select the Calendar Report sub-module from the menu at left.
2. From the drop-down, select the School Year.
3. Click Run Report.



Calendar Report
Monroe City School District: 2006-2007
11/13/2007

September, 2006		
Friday	29	Early Release Day (K-5)
October, 2006		
Monday	2	Yom Kippur (schools closed)
Monday	9	Columbus Day (schools closed)
November, 2006		
Friday	3	Early Release Day (K-5)
Friday	10	Veterans' Day Observed (schools closed)
Friday	17	Early Release Day (K-5)
Thursday-Friday	23-24	Thanksgiving Recess (schools closed)
December, 2006		
Friday	1	Early Release Day (K-5)
Friday	8	Superintendent's Conference Day
Monday-Sunday	25-31	Holiday Recess
January, 2007		
Monday	1	Holiday Recess
Friday	12	Early Release Day (K-5)
Monday	15	Martin Luther King, Jr. Day (schools closed)
Tuesday-Friday	23-26	Regents Examinations (school in session)

Note: This report contains a monthly breakdown of calendar dates, and is organized based on the dates of the school year (i.e., July 1 to June 30).

Scheduling > Course Catalog

Course details for all courses are found in the Course Catalog. The Course Catalog sub-module allows you to review and edit existing courses, and add new courses for the current or future years, which students may then register for.

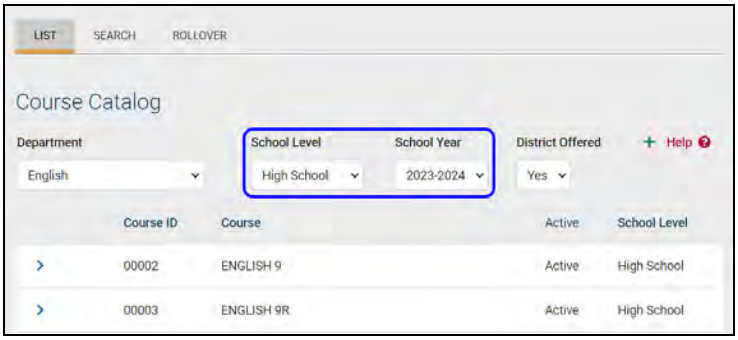
From within this sub-module, we also have the ability to selectively roll over course details from another year, saving a great deal of time in setting up a Course Catalog for a new year.

There are several basic options available to an administrator who is in the Course Catalog sub-module:

- Adding and Editing courses
- Searching for and examining courses
- Rolling over one year's Course Catalog

The **List** tab is the first of three available tabs, and is the default one to display. Notice there are drop-downs for Department, School Level, School Year and District Offered. These are all filters that allow you to limit the courses that you are viewing in the Course Catalog at any given time.

1. From the drop-downs, select the School Level and School Year you will be working with.



Note: Keep in mind that you will often be working in the next school year, though this window defaults to the current year. As long as you stay in the Course Catalog sub-module, the value you choose here will be used, but if you leave this sub-module, the year may revert to the current year.

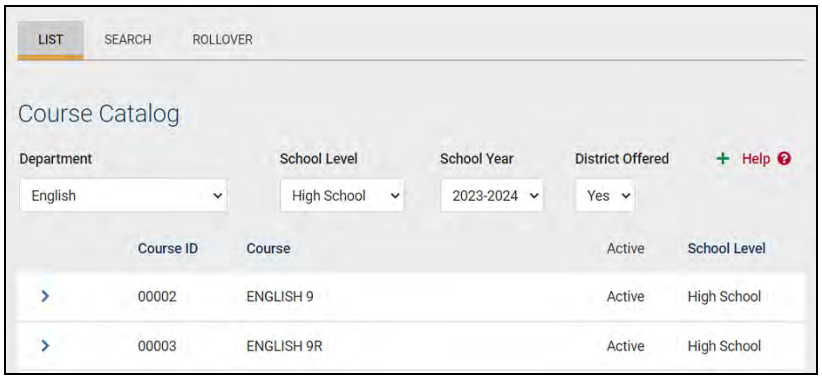
Tip: If you will be working with a specific building and/or school year for some time, you may want to temporarily change your Preferences, in the **Home** module, to reflect the work you are performing while in the Scheduling module.

List Tab

The **List** tab is selected by default when entering the Course Catalog. It provides a list of all existing courses.

Selecting a course from the List tab allows you to access the Course Description area for that course, where you can update general course information as well as yearly details, prerequisites, and course minutes. Use the drop-downs (Department, School

Level, School Year, and District Offered) to locate an existing course and click the Select > button to view information about an individual course. Use the green Add Course + button in the upper right to create a new course that is not already in the list.



The Search tab allows you to search for a course using a free-text search based on course description or course ID.

The Rollover tab allows you to choose courses to rollover from one year to the next in preparation for the upcoming scheduling season. When a rollover is performed, everything about every course, including assessments, grading options, flags, course name and ID, linking, etc, rolls over.

Course Description

Within each course in the Course Catalog, there is a great deal of information that SchoolTool uses throughout the application. Some of this information stays the same from year to year, while other settings are specific to each school year.

General Course Information:

Information in the top section of the screen applies to this course for any school year. This includes details such as Course Name, Course Number, Description, Course Attributes, and other informational fields. It also includes State Course Mapping options, Course Recommendations, and Subjects. When modifying these fields, be aware that changes to this information will affect all historical records tied to this course. For example, updating a course name from "Math B" to "Trigonometry") will change the way that course is logged in student permanent records, and it will appear as though students took "Trigonometry" in previous years when they actually took "Math B" during that year.

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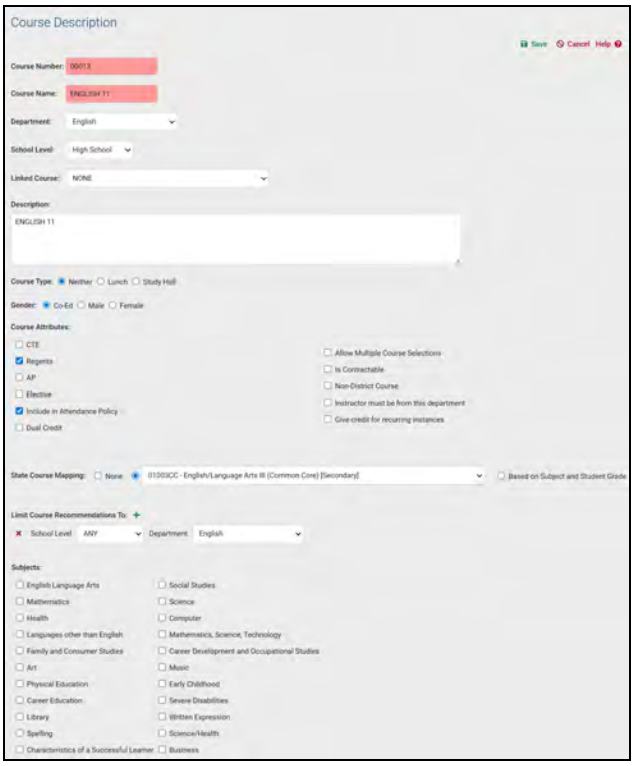

The following fields can be found in the Course Description portion of a course record.

1. **Course Number**: Free text, required field, maximum of 50 characters. Users should note that the NYS Data Warehouse only includes the first 12 characters of this field when validating that course numbers are unique.

   Click here to view some recommendations for numbering courses

   - Keep your course-numbering system simple and logical. Often, courses are grouped with similar courses (e.g., all English courses are in the 700-799 range).
   - Also, though text characters are allowed in a course number, we recommend **not** using spaces, as these can be confusing on future reports and when doing course selections. Use a hyphen (“-“) character instead of a space.
   - Courses with spaces in them also limit the ability to do certain types of course selections.
   - It is possible to have more than one course with the same number (ie, transferred in courses), or more than one course with the same name (i.e. three courses called "English 9" – one for Accelerated students, one for regular Regents students and one for Inclusion/Special Ed students), but **you cannot have two courses with the same name-number combination**, even if they are in

different school levels. For example, you may wish to number Earth Science taken in the Middle School with the same number as that taken in the High School you will need to make the numbers unique – such as "03900M" for Middle School and "03900H" for High School.
    - Courses that have leading zeroes (e.g., 003) should have the extra zeroes typed in. This is helpful when viewing sorted lists of courses.
    - Most courses will have unique ID numbers.

2. **Course Name:**Free text, required field, maximum of 50 characters. Course names should be as specific as required to tell the difference between courses in a list. Course names can be all-caps ("ENGLISH 10") or mixed case ("English 10"), and will display on student schedules, report cards and transcripts the way they are typed.
3. **Department:** Select a department from the drop-down list of pre-defined departments. A course can only be under one department and this list of departments is controlled by the district in the Maintenance module.
4. **School Level**: Select the appropriate school level from the drop-down list. A course can only be assigned to one school level. To create a course such as Earth Science, which might be offered at both the High School and Middle School levels, create two courses and assign one each to each level.
5. **Linked Course** : Select a course which is linked to this course from the drop-down list. The default is NONE. Choosing a course here means that students will not make selections for the linked course, but will automatically be scheduled in the linked course when the main course is selected. Make sure to link "sub" courses (such as labs) to "main" courses (such as lectures), and not the other way around. Note that linked courses, such as science labs, can also be dropped, withdrawn, and switched as a single entity.
6. Description Course descriptions can be copied/pasted from another location into this field; however, this field is text-only and will not retain formatting such as bold or italics. Note that this description does not currently print out on any course catalog listings or reports. However, it does display to teachers in their Info tabs. : Free text, maximum 255 characters. This field is for information only. Use it to describe any course pre-requisites or outline course curriculum.
7. Course Type Note: Lunch and Study Hall-type courses are not graded, do not have credit, and cannot be selected by students. Choosing either of these types also triggers logic used by the Student Schedule Builder to first schedule lunches, and to do study halls last as an overlay. It is possible to mark other courses, such as a required study period that all students get during lunch or a

Senior Privilege class, as "Lunch" or "Study Hall" in order to force the Student Schedule Builder to use the above logic when placing classes.~~~~~~-~~~~~~~~~~~~Note: Once marking period grades are submitted in any year, this field can no longer be edited.: select the appropriate radio button:
   - **Neither** – (the default) used for all non-lunch and non-study hall courses.
   - **Lunch** – used only for lunches.
   - **Study Hall** – used only for study halls.
8. Gender Note: Gender-specific courses may be set up as male-only and female-only (Phys Ed or Health, for example). If this is not appropriate to your district, leave this set to Co-Ed. When a gender value is assigned to a course, SchoolTool will prevent students of the opposite gender from making requests for this course, and the Student Schedule Builder will not schedule students of the opposite gender into this course.: select the appropriate radio button:
   - **Co-Ed** – (the default) this course is open to both genders.
   - **Male** – only male students can take this course.
   - **Female** – only female students can take this course.
9. **Course Attributes:**Check any boxes that apply. These boxes are used for course selections and informational reports Note: Refer to the section on Scheduling > Course Reports for more information on the Course Listing, Regents Course Listing, and AP Course Listing reports. . Some options may be unavailable depending on district settings.
   - **CTE** – flags this course to appear on CTE Reports; this value does not affect GPA or Rank
   - **Regents** – flags this course to appear in the Course Reports – Regents Course Listing report, and for grades from this course to be counted in the Regents Exam Report found in the Counseling module; this value does not affect GPA or Rank.
   - **AP** – flags this course to appear in the Course Reports – AP Course Listing report; this value does not affect GPA or Rank.
   - **Dual Credit** – indicates that this course is a dual or concurrent enrollment course, which means it is offered by a partnership between the district and at least one higher education institution. Students taking this course may be eligible to receive post-secondary credits for successful completion of this course. If selected, a dropdown list will appear to select the Dual Credit Setting.
   - **Elective** – flags this course for course selections, so students may set priorities (High, Medium or Low) for non-core courses; this value does not affect GPA or Rank.

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- **Include in Attendance Policy** – when this option is checked, period attendance data collected from this course will be used to meet thresholds for attendance letters.
- **Allow Multiple Course Selections** – flags this course for course selections so a student may be placed into multiple sections of the same course (such as those students needing two sections of Phys Ed in order to graduate)
- **Is Contractable** – students in this course can opt out of one or more cycle days to take another course; this value does not affect GPA or Rank.
- **Non-District Course** – this course has no district equivalent; typically entered to allow transfer students to get credit; this value does not affect GPA or Rank;
- **Instructor must be from this department** – narrows the list of teachers available to teach this course when creating sections; if unchecked, all faculty (including non-teaching staff) will display in the Faculty drop-down).
- **Enriched** – information only; flags this course to appear as enriched in the Course Reports – Course Listing report; this checkbox is driven by Maintenance settings. If your district does not offer Enriched courses, this box will not appear.
- **Honors** – information only; flags this course to appear as honors in the Course Reports – Course Listing report; this checkbox is driven by Maintenance settings. If your district does not offer Honors courses, this box will not appear.
- **Give credit for recurring instances** – when checked, this option will cause students to receive GPA credit for each instance of the course that was passed. Students will also receive transcript credit for each occurrence of passed courses. This option is unchecked by default, and should only be checked for those courses that are designed to be taken more than once, such as Phys Ed, Band, etc.

10. **Virtual Location:** Represents the virtual location code assigned to this course for data warehouse reporting purposes as defined in **Maintenance > Export > Virtual Locations**(this field does not appear if no virtual locations are defined in Maintenance). This value should only be modified by users who are familiar with virtual location codes and NYS Data Warehouse reporting.

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11. **Limit Course Recommendations To:** Allows users to limit teacher course recommendations to the selected building school levels and course departments.
12. **State Course Mapping Note that when the "Based on Subject and Student Grade" option is selected, NYS Data Warehouse exports will identify this course using the State Course Code + the Course ID, up to 12 characters.:** Allows users to modify state course code mappings from the course catalog for an individual course. This setting reflects any mapping defined in **Maintenance > Export > State Course Code Mappings**, and any modifications to this value will be reflected in the State Course Code Mappings area. This should only be modified by users who are familiar with state course mappings.
13. **Subjects:** These checkboxes are generally used only for elementary courses. If you are creating a High School or Middle School Level course, ignore these unless instructed otherwise.

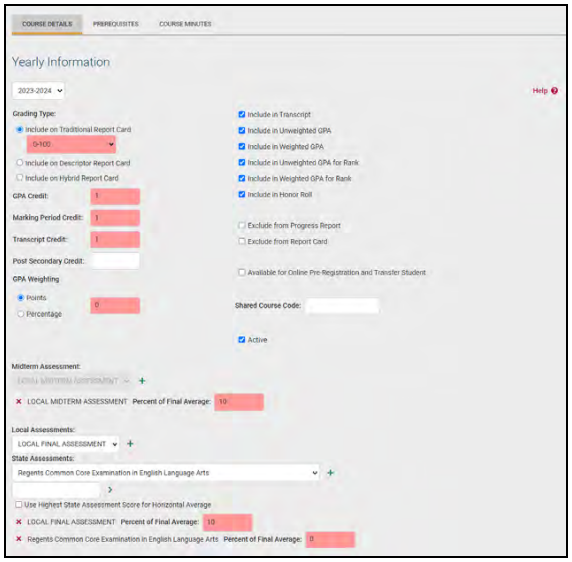
For elementary courses, select one or more subject areas which will be associated with this course. For example, if the course is a General Education course, you might select ELA, Math, Social Studies, and Science. These subjects are used in the setup of elementary course topics which are required for descriptor report cards and elementary teacher grade books. You must have at least one subject selected in order to grade this course.

Year-Specific Information:

Information that must be defined per school year is displayed in the bottom half of the screen. Once defined, these year-specific details are carried over

from year to year through the Course Catalog Rollover, though they can be changed from one year to the next without impacting historical data. Available tabs for yearly details include the following:

- Course Details (used to configure yearly information for a course, including grading type, credit values, GPA weighting, assessment information, and other settings that impact grades, rank, honor roll, and reports; this area also includes the option to set a course as active or inactive for a specific year)
- Prerequisites (used to define courses that must be completed before a student can take this course; adding prerequisites to this course prevents students from adding it as a selected course if they have not completed the prerequisites listed here)
- Course Minutes (used to specify how many minutes a course (or subjects tied to that course) is taught for TSDL calculations and data warehouse reporting purposes)



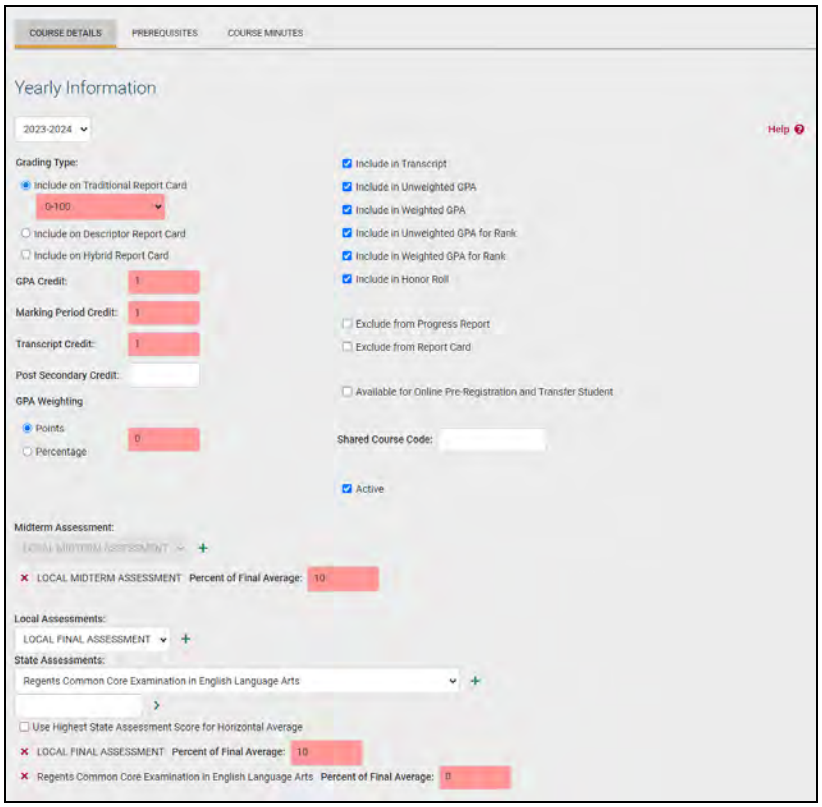
Course Details

The Course Details tab contains multiple fields that control grading options, credit values, weighting points or percentages, assessment information, and several flags which designate whether grades entered for these courses will be used to calculate weighted and un-weighted GPAs and ranks and honor roll. This is also where a course is flagged as Active or not.

To define yearly details, first select a school year (by default, this will be set to the current school year). If needed, click on the green Add Course Details ➕ button. The

screen will refresh with additional fields to be completed. It may be necessary to scroll to see all the fields.

Note: Courses listed as a 'Lunch' or 'Study Hall' Course Type will not have Course Details in the Yearly Information section. However, it is still necessary to click the "Add Course Details" ➕ button to ensure these courses are active for the selected year.



The following fields can be found in the Course Details tab:

1. **Grading Type**– Choose the appropriate radio button and resulting options (one of the radio buttons must be selected here or teachers will be unable to grade this course):

    A. **Include on Traditional Report Card** – used for Middle and High School levels. When selected, users must choose the grading scale for the final grade for this course from the drop-down field.

    B. **Include on Descriptor Report Card** – used for Elementary School levels.

    When selected, a **Submit report card comments by course** checkbox appears. Select this check box if elementary report cards allow

subject-specific comments. When this option is checked, teachers will see a section for general comments for the course on grade submission screens; this "general comments" section will not be displayed if this option is unchecked.

C. **Include on Hybrid Report Card** - used for Standards-Based Grading when both numeric and standard grades are being reported.

When selected, users must choose the grading scale for the final grade of this course from the drop-down field.

The "Submit report card comments by course" checkbox is also available. This checkbox controls whether general comments can be submitted on the Submit Descriptor/Standard Marking Period Grades screen.

2. **GPA Credit**–The number entered here is used to calculate the amount of credit this course brings to bear on the student's **horizontal** GPA for that course.

   For example, a course worth .5 GPA credit (such Phys Ed) will not impact a student average as much as a course worth 1.5 GPA credit (such as an AP course).

3. **Marking Period Credit** – The number entered here is used to calculate the amount of credit this course brings to bear on the student's **vertical** average per marking period.

   For example, a course with a Marking Period Credit of 0 (such Phys Ed) will not impact a student's vertical average at all, though this same course can be used for the overall horizontal average.

   Note: Vertical averages appear on the student report card depending on district preferences.

4. **Transcript Credit**–The number entered here indicates the total amount of credit achieved when the student passes this course. This number appears on the student report card and transcript, depending on district preferences.

   Note: For GPA Credit, Marking Period Credit and Transcript Credit, the following are true:

   - The default credit value is zero.
   - The credit field is numeric and will accept decimals.

     Note: For *GPA Credit* and *Transcript Credit* only, the following is true:

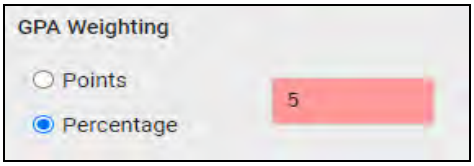
- The credit value can be altered on an individual student's record.

5. **Post Secondary Credits** - Defaults to blank. Choose the appropriate value, if applicable.

6. **GPA Weighting**– Choose the appropriate radio button and add a numeric value (if desired, between –100 and +100 are allowed):

    A. **Points** – indicates that the designated number of points will be added to the GPA (i.e., 5 points might be added to the GPA of a student who took this AP course, so a GPA of 90% would become 95%.)

    B. **Percentage** – indicates that a designated number of percentage points will be added to the GPA (i.e., 5 percentage points moves an average of 60% to a 63%). Enter whole numbers (i.e., 5 for 5%, not 1.05) to induce the proper multiplier effect.



7. **Course Difficulty** – Some districts may use the Course Difficulty drop-down to indicate courses that are "more difficult" than other courses. If configured, users must select a value from the list in order to save the Course.

    If you do not see this information, then it is not enabled for your district.

    Note: Course Difficulty values are for information purposes only and are not tied to grading, weighting, or student GPA calculations.

8. Check the boxes of any appropriate fields on the right side of the **Course Details**tab.

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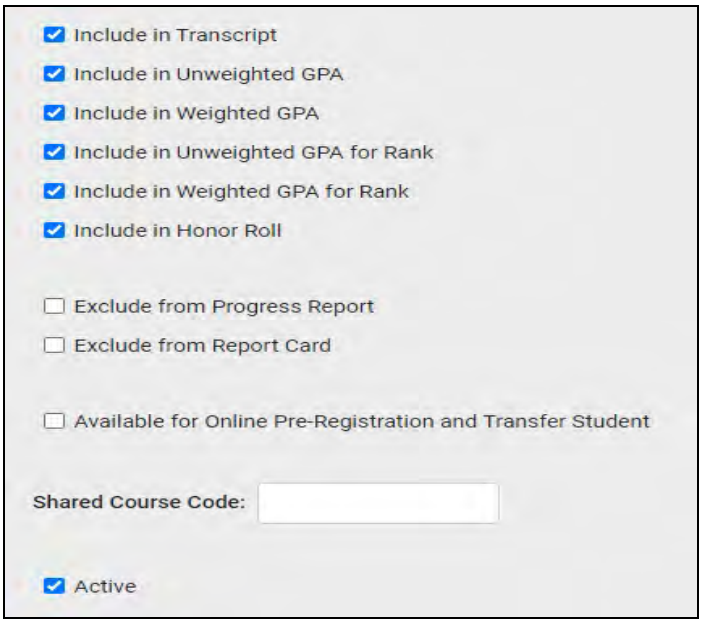

A. **Include In Transcript** – Include this course information and final grade in the transcript.

B. **Include In Unweighted GPA** – Include the final grade from this course in the student's unweighted GPA.

C. **Include In Weighted GPA** – Include the final grade from this course in the student's weighted GPA. If your district does not use Weighted GPAs, this field is ignored.

D. **Include In Unweighted GPA for Rank** – Include the final grade from this course in the student's unweighted GPA for ranking.

E. **Include In Weighted GPA for Rank** – Include the final grade from this course in the student's weighted GPA for ranking. If your district does not use Weighted Ranks, this field is ignored.

F. **Include In Honor Roll** – Include the marking period grades from this course in the school-level honor roll (and other achievement roll) calculations.

   Note: Other achievement roll calculations includes vertical marking period average calculations. If the district does not utilize an Honor Roll system but does want to see a vertical marking period average, this should be checked.

G. **Exclude from Progress Report** – Hide the details of this course from displaying on canned or custom progress reports. (This does not affect how grades from this course are used in grade calculations.)

H. **Exclude from Report Card** – Hide the details of this course from displaying on canned or custom report cards. (This does not affect how grades from this course are used in grade calculations.)

I. **Available for Online Pre-Registration and Transfer Student** – Include this course in drop-downs for course selections in online pre-registration and transfer student screens.

J. **Shared Course Code –** This value specifies the code that will be used to map courses when using the **Counseling > Retrieve Student Grades** area to import student grades. Values should match between both BOCES and component districts. It may be any alphanumeric string, but must be unique for each shared course in the district.

K. **Active** – Denotes whether this course is active in the selected year or not.

   Note: If a course is made inactive for the selected school year, but Course Details are defined in the Yearly Information section, the course will continue to display in the list of all courses in the Course Catalog List tab.

   Note: Making a course inactive prevents it from being selected in the Course Selections and Selection Maintenance sub-modules, and also prevents sections of this course from being built in the Master Schedule Builder.

   Note: If you wish to make a course inactive after student selections and master schedule course sections have been built, those selections and sections will still remain, though they will be ignored when the Student Schedule Builder is run. To avoid any confusion, remove sections and selections prior to deactivating a course.

   Note: All flags except Active can be manually configured per student on the student's Grades tab in Counseling.

   Note: Changes made to GPA or Transcript Credits, GPA Weighting, Assessment Percentages and "Include In" check boxes will trigger the grading thread to be run. This will set off a series of tasks which will

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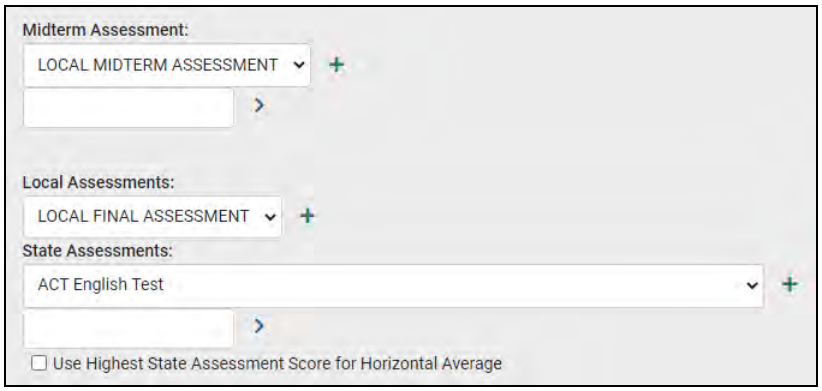
update permanent record histories for students who are tied to this course.

9. **Skill Sets**: If configured in Maintenance, one or more skill sets can be tied to a course. Once a skill set has been assigned, it cannot be deleted if any assignments are tied to that specific skill set.

Linking exams (assessments) to courses is not required, but by adding assessments here, teachers will be able to select and grade the exam in their grading area for this course.

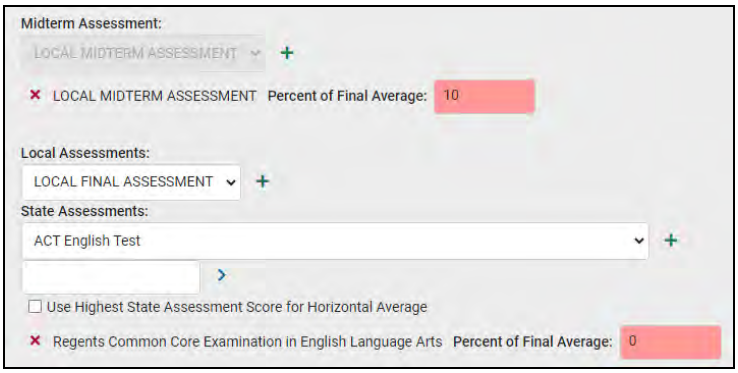
If your district requires that NYS Regents exams given during courses display with course grade information on the report card and transcript, then each state assessment should be tied to its relevant course prior to the first assessment schedule date (i.e. January) of the new school year.



To link an assessment to the current course's Yearly Details:

1. Choose an assessment to add from one of the three Assessment drop-down lists: Midterm, Local, or State.
2. Click the Add Assessment ➕button that is next to the assessment you just selected.

3. The screen will refresh showing the midterm listed in read-only mode with a red ❌ to the left and a new field where you can add the **Percent of Final Average**. If you will be adding multiple state assessments, please refer to the special note about adding multiple weighted state assessments, below for information on calculating horizontal averages.



Note: You can only add one midterm exam to a course, but you can add multiple local and state assessments.

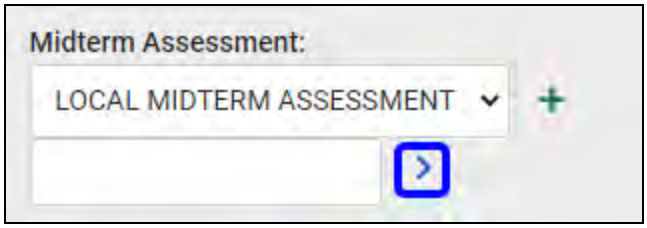
Note: An assessment has not been added to this course until you see a red ✖ to the left and a pink (required) **Percent of Final Average** entry field to the right of the assessment name.

Note: The Percent of Final Average value tells SchoolTool how to use the exam score in the final horizontal average for this course. The default value is zero. If a zero is left in the field, the exam score will not be calculated into the horizontal average. This value impacts the final average of the course and will not affect the in-progress average.

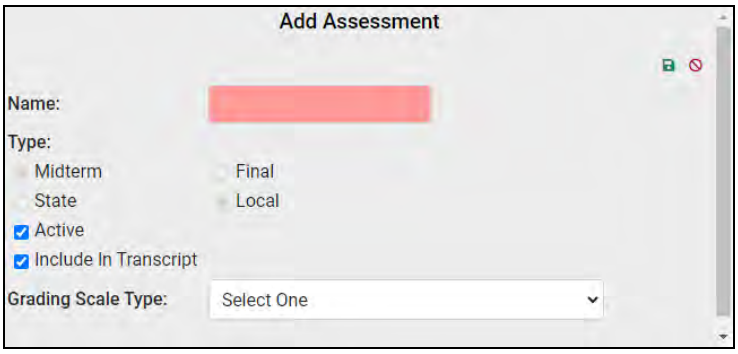
If you wish to include midterms in students' in-progress averages, check the appropriate option in Maintenance.

If the Local Midterm or Final Assessment you need is not available, do the following:

1. Click once on the Add new assessment ❯button to the right of the free-text field under the appropriate Assessment drop-down.

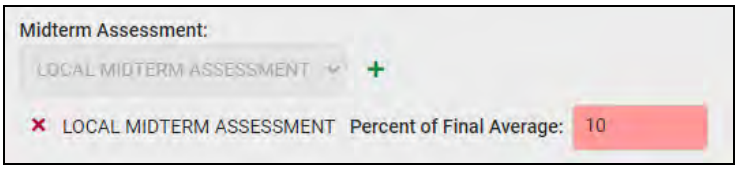


2. A new Add Assessment window will appear:



3. Enter the Assessment **Name** . This is a required, free-text field, and will hold a descriptive name up to 250 characters in length.
4. Choose any appropriate check boxes (**Active** or **Include in Transcript**) or radio buttons (**State**midterm or **Local**midterm).
5. Select the **Grading Scale Type**from the drop-down list.
6. Click once on the Save button.

7. The Add Assessment window will close, returning you to the Yearly Information tab, where the new assessment now appears in read-only mode, with a new field for **Percent of Final Average**.



8. Add in a numeric value for the percentage, if appropriate.
9. Click once on the green Save button (in the upper right corner of the Course Description tab) when you have finished updating this course. The screen will refresh returning you to the main Course List tab.

   Warning: If the State Assessment that you need is not found in the list, please enter a support request or contact your SchoolTool liaison. State Assessments are usually assigned a special code or value that is used when your district exports assessment data for the Data Warehouse. Entering a State Assessment on your own will not trigger these codes, and assessment data may not export correctly.

   Note: Once a new assessment has been added here, it can be edited in the Assessments sub-module of the Counseling module. Refer to the Counseling > Assessments procedures (adding, editing, scheduling) for more information.

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Note: Take caution to ensure that the assessment you want is not available in the drop-down list before adding one, as there is no way to delete duplicate assessments once they have been created.

Tip: You can add a generic course midterm and local final, and then use these over and over. By adding them to different courses, and assigning different percent of final average values, each assessment will be treated as unique.

10. Check the **Use Highest State Assessment Score for Horizontal Average** option, if appropriate.

    Note About Multiple Weighted State Final Assessments:

11. In some cases, a course may require multiple weighted state final assessments be added to the course (for example, courses might be associated with both a Regents final *and* the Common Core Regents final for a given year). In those situations, use the **Use Highest State Assessment Score for Horizontal Average** option to specify how these assessments should be used in average calculations. Checking this option would allow the district to weight all state assessments appropriately and then use only the highest score to calculate the student's horizontal average for the course.

    - This option only applies to state assessments that have a weight.
    - If multiple state assessments exist but only one has a weight, that assessment score will be used.
    - If multiple weighted state assessments exist and each has the same score, the calculation will use the score from the higher weighted assessment.

Prerequisites

Prerequisites are courses that must be completed before a student can take this course. Adding a prerequisite to a course prevents that course from being selected by students before taking the prerequisites.

Currently, prerequisites function only for courses requested and scheduled in the same year.

1. Click once on the **Prerequisites**tab and add course pre-requisite data, if appropriate:

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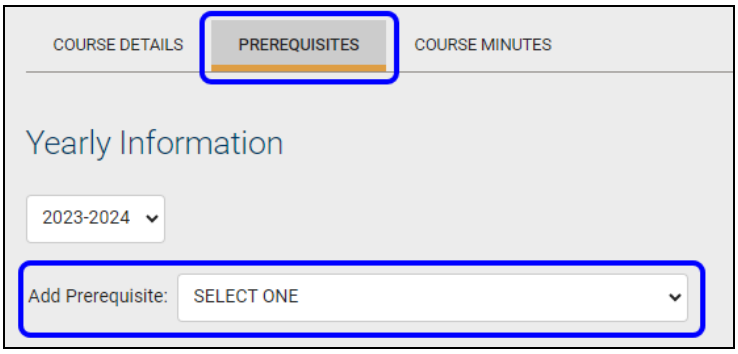


2. Select the appropriate course year from the Add Prerequisite drop-down list. The course will appear in a read-only list below, with a red ✖ to the left.

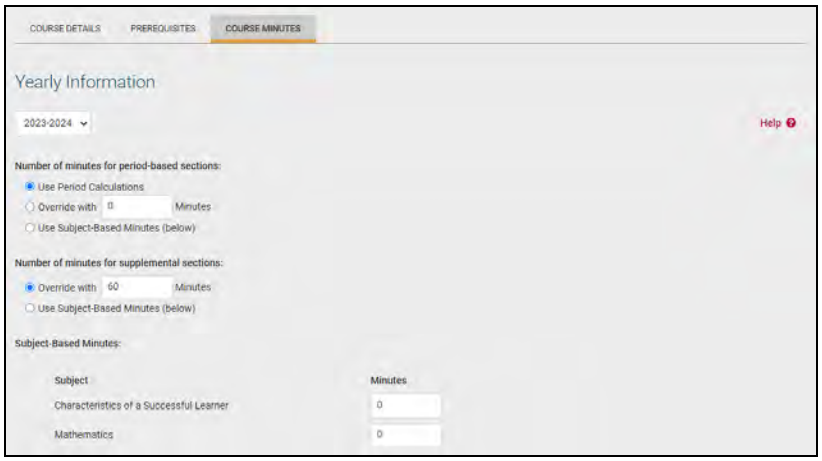
3. When you have finished defining all prerequisite course details, click once on the green Save button at the very top right corner of the Course record. The screen will refresh, returning you to the main Course List tab.

   Note: This feature works optimally if there is only a single prerequisite per course. If you list more than one course as a prerequisite for this course, you may get varied results when the Student Schedule Builder attempts to load student schedules.

Course Minutes

This area allows users to specify how many minutes a course (or subjects tied to a course) is taught. When using the Rollover feature in the Course Catalog, any settings defined in the Course Minutes tab will be included in the course rollover. These may be redefined for a given year after rolling over as needed.

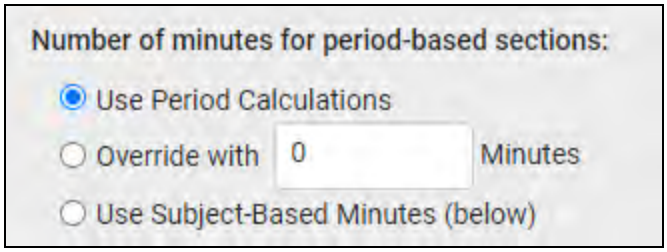
Note: This information will be used to determine student-teacher relationship time for data warehouse purposes.



Course Minutes are year-specific and can be defined separately for period-based sections and supplemental sections. Minutes defined in this area represent the number of minutes a course meets per “daily session” or individual meeting time.

For period-based sections, select one of the following options:

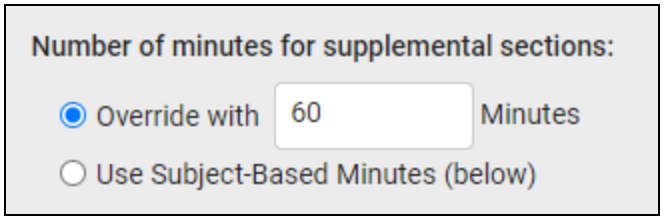
- Use Period Calculations: This option will use actual period times to calculate the number of course minutes.
- Override with “X” Minutes: This option will use the numeric value entered here (“X”) to calculate the number of course minutes.
- Use Subject-Based Minutes (below): This option will use the numeric values entered for each subject in the Subject-Based Minutes section at the bottom of the screen to calculate course minutes on a per-subject basis.



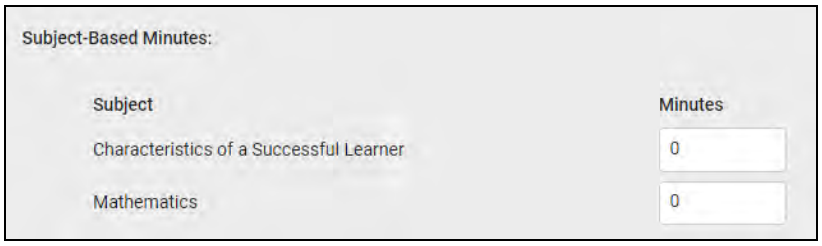
For supplemental sections, select one of the following options:

- Override with “X” Minutes: This option will use the numeric value entered here (“X”) to calculate the number of course minutes.
- Use Subject-Based Minutes (below): This option will use the numeric values entered for each subject in the Subject-Based Minutes section at the bottom of the

screen to calculate course minutes on a per-subject basis.

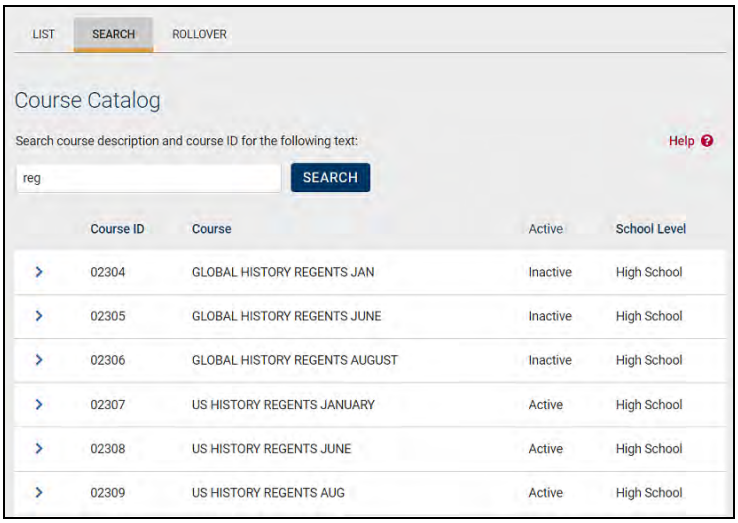


If “Use Subject-Based Minutes” is selected for either period-based or supplemental sections, minutes must be defined for each subject listed at the bottom of the screen. The subjects listed here are based on the subjects selected in the Course Description above. Enter a number of minutes for each subject.



To locate a course with the Search tab:

1. Click on the **Search**tab.
2. In the Search text box, type in any portion of the course number or the course name and click once on the Search button to see a list of matches.



3. Use the Column labels to sort, and the page number to move between pages of courses.

4. You may at this point either use the Select > button to edit the desired course, or note the name and number for future reference.

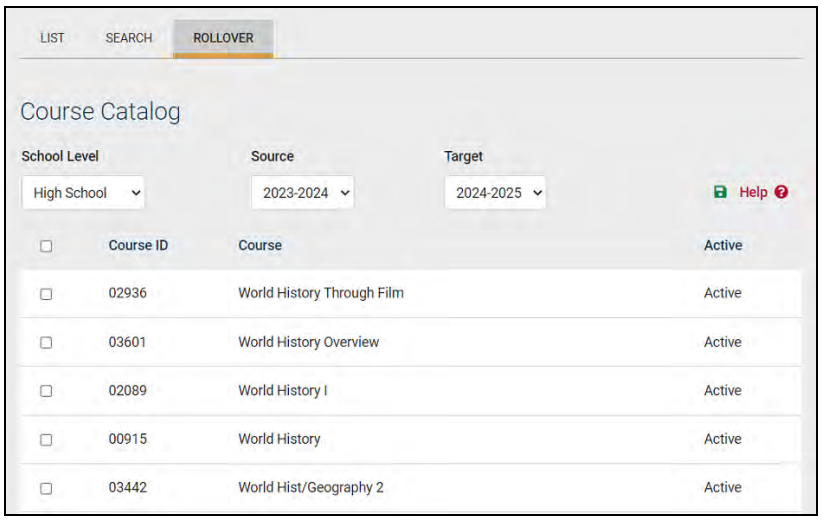
Course Catalog Rollover Tab

The Course Catalog sub-module contains data for all past and current courses. Each year, courses which will be offered the following year need to be rolled over to allow students and counselors to program schedules.

Rolling over a Course Catalog simply refers to the process of automatically creating Yearly Information for all (or most) courses in the Course Catalog for a specific year. Though courses could be 100% manually created, a huge time savings can be seen by rolling over a previous year's courses into this year. When a rollover is performed, everything about every course, including assessments, grading options, flags, course name and ID, linking, etc, rolls over.

Until courses exist in a specific year's Course Catalog, student course selections cannot happen.

Reference the sections on *Course Description* and *Yearly Details* for additional information when making changes or adding courses.



1. To rollover courses, first Select the appropriate values from the three drop-down lists:
    A. **School Level:** Which school level the Course Catalog will be rolled over *from*.
    B. **Source:** This is the year that we will be using as our "master" or "source" for copying. Typically, this would be the current year's Course Catalog, if we are trying to build next year's catalog.
    C. **Target:** This is the year we'll be copying the new Course Catalog's information to. This would be the year we are building the schedule for; typically **next** year.

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2. Use the selection check boxes to select all of the courses you would like to rollover.

Course ID	Course	Active
02936	World History Through Film	Active
03601	World History Overview	Active
02089	World History I	Active

3. You may click on the column labels to sort your text, and can use the top checkbox to select (or deselect) all courses at once.

   Note: Sorting the list will remove any course selections you have made. Make sure to sort the list before you select or deselect courses to be sure you have checked the boxes appropriately.

4. Click once on the Save button in the upper right.

5. You will be presented with a result window that will show the status of the rolled over courses:

   A. **Not Selected**: The course was not selected for rollover from the previous screen.
   B. **Skipped:** The course was not rolled over, likely because it already exists in the target year, and has course information.
   C. **Success:** The course was successfully rolled over to the target year.

   Note: If a course exists with Yearly Information that was either previously rolled over or manually entered, it will not be overwritten with this process. Essentially, you are protected from accidentally overwriting courses with existing Yearly Information.

   Note: If too many courses are rolled over, they can be inactivated by editing the Course Details. See *Adding and Editing courses*.

   Note: It is possible to roll the Course Catalog back as well as forward. For example, in order to build permanent record information for transfer students, you may want to create 3 or 4 years of past catalogs, based on the current year's Course Catalog. To do this, simply select the Target year as a year in the past.

   Warning: If you have manually added "new" (ie, non-district) courses to a past year, and then you roll that year (as the Source) into the current year (as the Target), these "new" courses from the past will appear as active courses in the current year.

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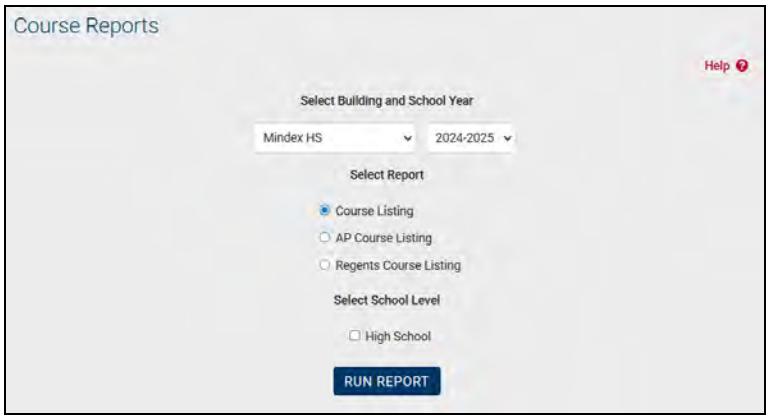
Scheduling > Course Reports

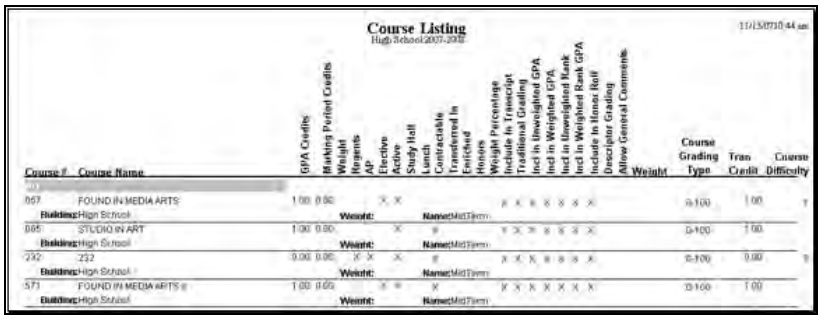
The Course Reports sub-module allows users to generate printable course lists.

There are three reports to choose from:

- **Course Listing**, which lists every course in the catalog for the selected building and year
- **AP Course Listing**, which lists only those courses tagged as AP for the selected building and year
- **Regents Course Listing**, which lists only those courses tagged as AP for the selected building and year

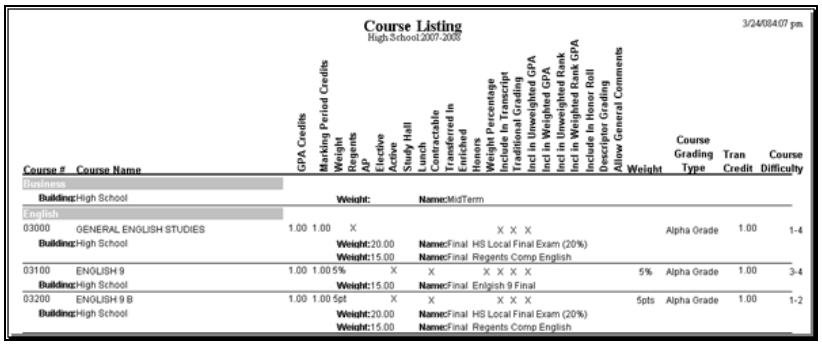


1. From within the Scheduling module, select the Course Reports sub-module from the menu at left. The screen will refresh with a variety of options.
2. From the drop-downs, select the School Level and School Year you will be working with.
3. Use the radio buttons to select the report you wish you run.
4. Make sure a check is placed in the box for the appropriate School Level.
5. Click Run Report.



Note: Course Listing reports can be run for any building and any school year for which a course catalog exists.

Note: There are three (3) Weight fields on this report. In addition, the Weight Percentage flag will display an 'x' if GPA Weighting Percentage is selected.



Course Listing
High School 2007-2008

3/24/08 4:07 pm

Course #	Course Name	GPA Credits	Marking Period Credits	Weight	Regents Or Elective Action	Study Hall	Lunch	Contractable	Transferred In	Enriched	Honors	Weight Percentage	Include In Transcript	Traditional Grading	Incl in Unweighted GPA	Incl in Weighted GPA	Incl in Unweighted Rank	Incl in Weighted Rank GPA	Include In Honor Roll	Descriptor Grading	Allow General Comments	Weight	Course Grading Type	Tran Credit	Course Difficulty
Business																									
Building:	High School			Weight:					Name:	MidTerm															
English																									
03000	GENERAL ENGLISH STUDIES	1.00	1.00		X									X	X	X							Alpha Grade	1.00	1-4
Building:	High School			Weight:	20.00				Name:	Final	HS Local Final Exam (20%)														
				Weight:	15.00				Name:	Final	Regents Comp English														
03100	ENGLISH 9	1.00	1.00	5%		X			X				X	X	X	X						5%	Alpha Grade	1.00	3-4
Building:	High School			Weight:	15.00				Name:	Final	Enlgish 9 Final														
03200	ENGLISH 9 B	1.00	1.00	5pt		X			X				X	X	X	X						5pts	Alpha Grade	1.00	1-2
Building:	High School			Weight:	20.00				Name:	Final	HS Local Final Exam (20%)														
				Weight:	15.00				Name:	Final	Regents Comp English														

Note: The **Allow General Comments** field is only used if an elementary grading type is used and the 'Submit report card comments by course' option has been selected.

Scheduling > Course Selection

The Course Selection sub-module allows you to make course selections (requests) for an individual student's upcoming years using various methods to select courses from the Course Catalog.

Selecting courses in this sub-module is a task for a school administrator performing the course selection task on behalf of a single student. There are other options available for making course selections for students:

- For making course selections for groups of multiple students at once (batch selections), see **Scheduling > Selection Maintenance**.
- For information on making course selections for transfer students and for projected enrollments, see the section on Course Selections for Projected Enrollments and Transfer Students.

When making course selections, there are several things to keep in mind:

- Course selection changes can be made using any of three different methods as described in this section. We are not limited to using any one method and can combine methods as needed.
- Course selections are only saved for a student when the green Save button is clicked. Leaving a student's information screen without saving will cause all unsaved course selection changes to be lost.
- Lunches, study halls, and linked labs will not, and should not, be selected during the course selection process. SchoolTool's Student Schedule Builder tools will schedule lunches, study halls and linked labs automatically.

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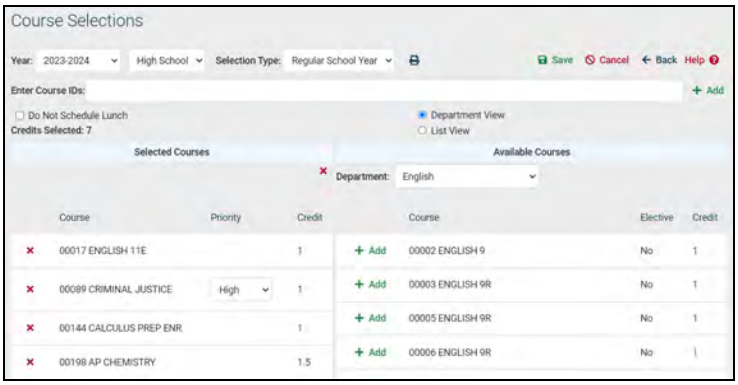
1. Navigate to **Scheduling > Course Selection.**
2. Using the Search text box or Advanced (Batch Selector) Search, locate and select the desired student's Personal Information record (see the Introduction to SchoolTool and Batch Selector User Guidedocuments for details).
3. Scroll down to the bottom of the screen to see the student's current course selections.



Note: The student's course selections are visible at the bottom of the record, below the Student Information tabs (Contacts, Attendance, Schedule, Notes). You can either scroll down to see this information or hide the Student Information tabs to reduce scrolling. Some users also find it useful to select the student's Schedule tab (from among the Student Information tabs) to use it to review the current schedule against next year's selections.

Student Course Selections

Once you have navigated to the desired student and are looking at the Course Selection section of the screen, you will be able to enter selections in several different ways.

Course selections may be made for any school year for which the student has an official or projected enrollment, though they only have impact when the automatic scheduling tools are run for the year in which selections have been made.

Use the Year and School Level drop-downs to specify which course catalog you wish to use for selections. The School Level drop-down will include any schools for which the student has an official or projected enrollment, an alternate enrollment, or other existing course selections.

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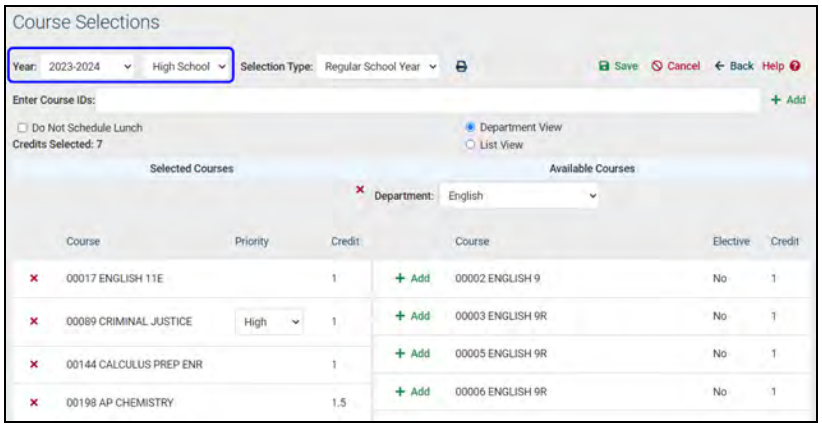
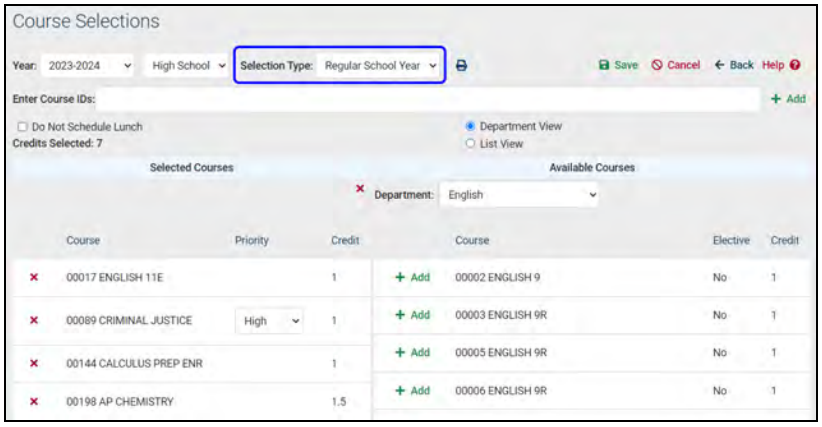
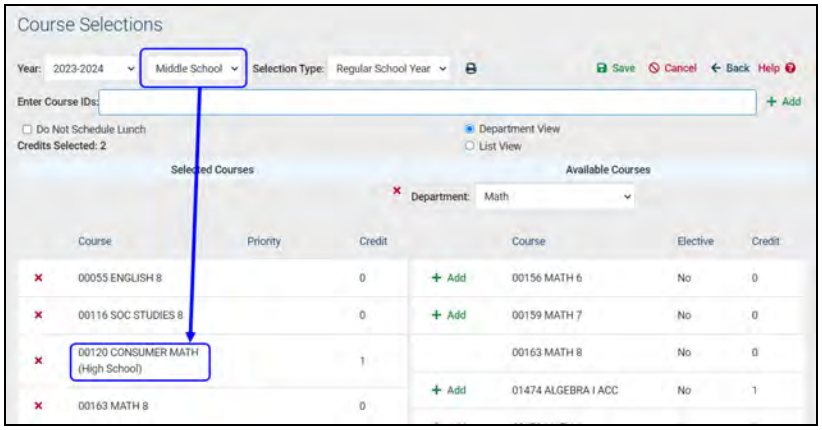


Course selections can be associated with either the Regular School Year or Summer School by using the Selection Type drop-down. This is primarily used when running scheduling tools, such as the Student Schedule Builder. It can also be used for purely informational purposes. In general, it is recommended to leave this set to Regular School Year unless you have been directed otherwise.



Course selections for schools other than the one currently selected will be indicated on screen.



Course selections can only be made for courses that are listed as active in the specified year's Course Catalog; if a course is not active, or if the course has no Yearly Information attached to it, then selections for the course cannot be made. For example, courses designated as a Course Type of Study Halls or Lunch will not have Yearly Information, so it is not possible to make selections for these courses.

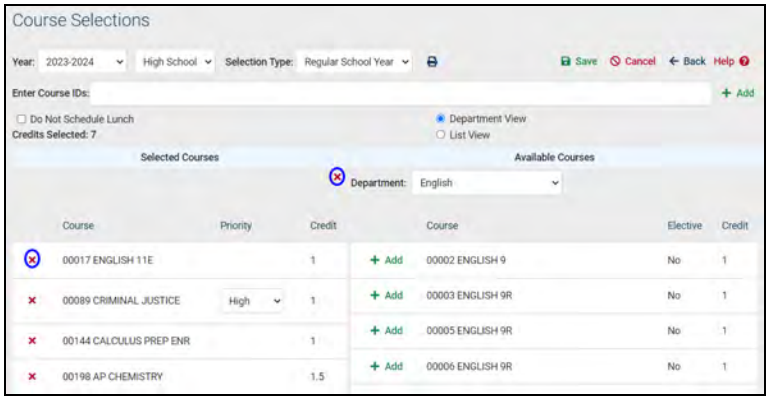
Additionally, selections cannot be entered for any course that has been linked to another course in the Course Catalog (such as a lab that is linked to a Science course).

All three methods of entering course selections are listed here. Remember that you may use any of these selections techniques in any combination.

Note: Selections are not saved automatically, so moving to the next student in the list without clicking on the Save button will lose any current selections.

After course selections have been made, it is easy to remove them to correct errors or adjust the number of selected credits.

- **Any single course selection**can be removed by clicking the Delete ✖button to the left of each course selection.
- **All course selections**may be removed from this student by clicking the Delete ✖ button above the list of selected courses.

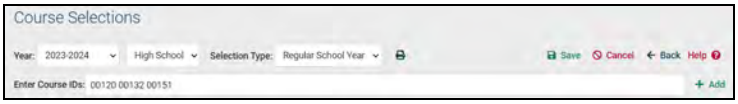


Select Courses by Course ID

Selecting courses by ID number requires that you are familiar with the numbers of the courses to be selected, not just the names. You may have a copy of the Course Catalog, a paper copy of the student's selections, or simply remember the appropriate course numbers.

If you mistype a course number, it is an easy process to confirm and remove the selection.

1. Locate the **Enter course IDs**text box and type in the series of course numbers, **separated by spaces.**

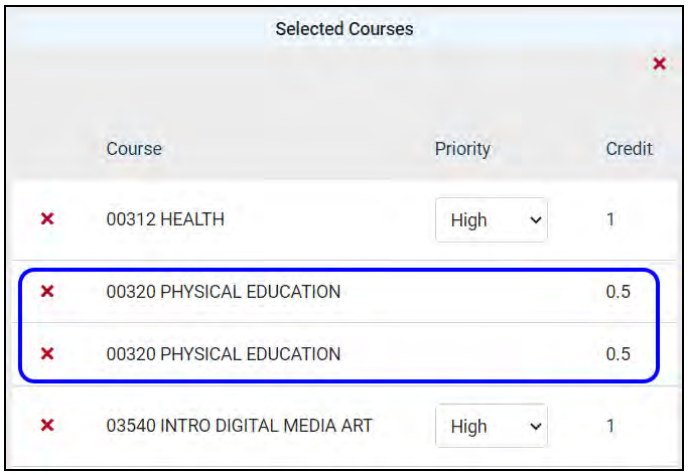


Note: The course numbers you enter will be searched for in the selected School Level. As soon as a single course selection is made, this drop-down will become grayed out, assuming that the rest of the student requests will be made from the same School Level Course Catalog.

Tips: Course numbers must be entered "strictly." To minimize errors, SchoolTool expects users to adhere to the following rules:

- Course numbers must be exact matches. If a course has a leading zero in the Course Catalog, for instance, it must have one here to be a match.
- Some courses may have text (letters) as well, these must match too.
- Spaces are the only delimiters (dividers) allowed. Commas, semicolons, and other characters should not be used unless they are part of the Course ID. "123, 456" will not select the two courses as expected, though "123 456" will.
- Courses that have spaces in the course number, like "655 A" instead of "655A" or "655-A" cannot be selected with this method, as the space is used as our delimiter.

  Note: If the student requires two or more selections of a course, and the course is set up to Allow Multiple Course Selections in the Course Catalog, you can enter the course number multiple times and it will be added as many times it is selected. An example of this might be a student who has to double up on Phys Ed in order to graduate.



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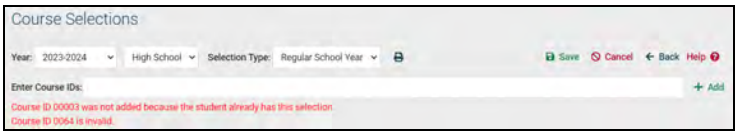
2. Click once on the Add ➕button at the end of the entry field to add the courses to the student's selections.

   The screen will refresh, taking all of the course numbers and converting them to a list of courses in the left hand column, labeled "Selected Courses".

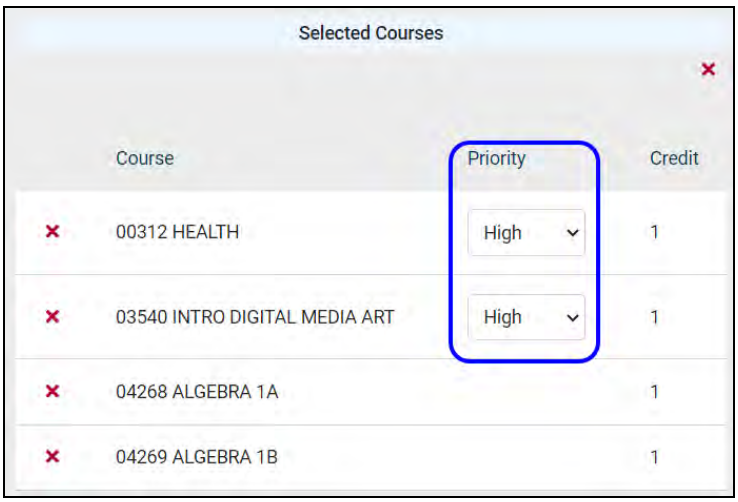
3. Examine your results.

   Any problems discovered while adding the courses will be displayed, in red, above the course selection results. Typically, courses that have already been added, that don't exist, or that were entered wrong (i.e., typed with a comma or missing their leading zero) will trigger these error messages.



   Note: It is not possible to add duplicate course requests, unless the course is setup to allow multiple selections in the Course Catalog. See for more information.

4. If a course is designated in the Course Catalog as an Elective, a priority drop-down will appear to the right of the course name.



   The priorities you select here are used by the automatic schedule builder tools to place a student in the preferred course in the event of a scheduling conflict.

   Some schools, such as middle schools, may not have electives defined, so these priority drop-downs may never be seen.

5. Save your selections by clicking the green Save button at the very top of the student record; you may have to scroll up to see this button. Once complete,

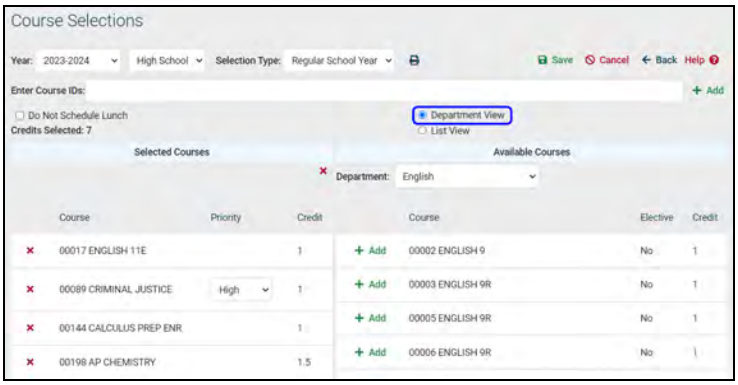
you will see a confirmation message indicating that selections were saved.

Note: Selections are not saved automatically, so moving to the next student in the list without clicking on the Save button will result in the loss of any current selection changes.

Select Courses by Department

Selecting courses by department allows the administrator to browse course options by individual department without having to see all courses in all departments. This may aid the administrator when, for instance, trying to select the best English course for a student.

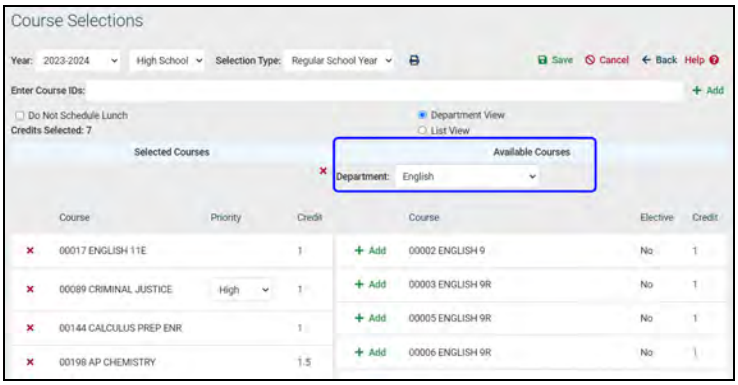
1. Select the **Department View**radio button in the course selection area. This is the default option, so it may already be selected.



Note: The corresponding list of Available Courses will be based on the selected School Level. For example, you may have Art courses in both the Middle School and High School, but only those in the selected level will display.

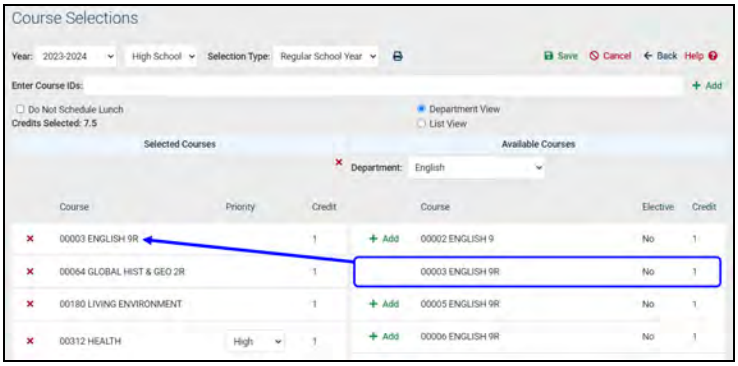
2. Locate the course to be selected by choosing its department from the **Department**drop-down list.

   The screen will refresh to show all available courses for that department in the selected School Level.



Note: There are two types of courses in this list: Core and Elective. Core courses have a value of **No** in the Elective column; electives have a value of **Yes**.

3. Click once on the green Add ➕button to the left of the course you would like to select, under the Available Courses section. The screen will refresh showing the selected course on the left side, under the **Selected Courses**tab.



Note: The course name still appears in the Available Courses list, though the Add button is no longer visible, making it impossible to add a course twice. However, if the course is set up to Allow Multiple Course Selections in the Course Catalog, the Add button will remain visible, allowing the user to add the course numerous times. An example of this might be a student who has to double up on Phys Ed in order to graduate.

Note: The Available Courses list is in order of Course Number, not by grade or course name.

4. Continue using the **Department**drop-down list and the Add buttons to move courses from the **Available Courses**list to the **Selected Courses**list.
5. If a course is designated in the Course Catalog as an Elective, a priority drop-down will appear to the right of the course name.

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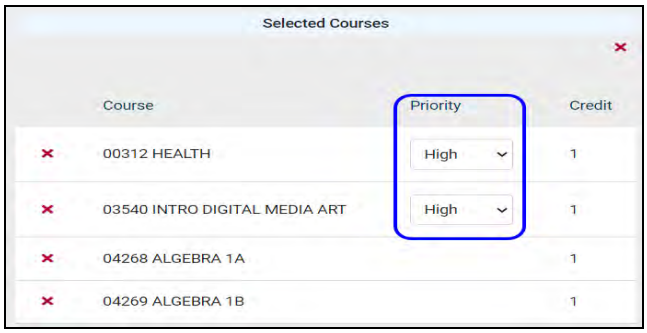


6. The priorities you select here are used by the automatic schedule builder tools to place a student in the preferred course in the event of a scheduling conflict.

   Some schools, such as middle schools, may not have electives defined, so these priority drop-downs may never be seen.

7. Save your selections by clicking the green Save button at the very top of the student record; you may have to scroll up to see this button. Once complete, you will see a confirmation message indicating that selections were saved.

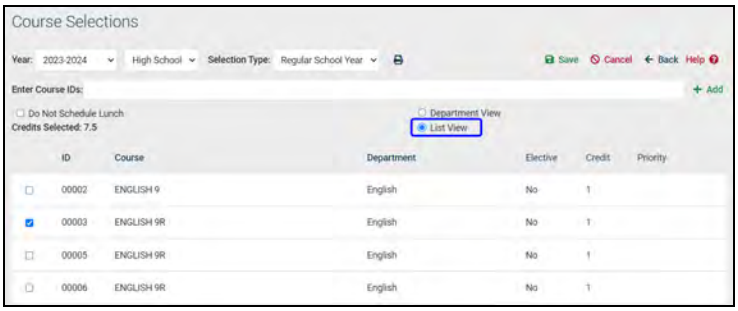
   Note: Selections are not saved automatically, so moving to the next student in the list without clicking on the Save button will result in the loss of any current selection changes.

Select Courses by List

Selecting courses by the list view allows an administrator to see all active courses in all departments on the screen simultaneously, and to use a series of checkboxes to select courses for each student.

The list of checkboxes can easily be sorted in different ways (by course, by course ID, and by Department) to make the selection easier.

1. Select the **List View**radio button in the course selection area.



2. The screen will refresh with the full list of courses for the selected School Level, displayed with their IDs and course names, checkboxes for selecting or deselecting, and other details, such as Department, Elective, Credits and

Priorities. This list may be long and take a few seconds to refresh, as it contains every course that is active in the Course Catalog.

Note: There are two types of courses in this list: Core and Elective. Core courses have a value of **No** in the Elective column; electives have a value of **Yes**.

Tip: The default display order for the list of courses is numerically by course ID. However, the first three columns (ID, Course, and Department) can all be sorted by clicking once on any of their column headings. Clicking a second time on the same column heading will sort the list by that column again, but in descending order. Sorting in this manner allows the administrator to more easily locate courses that may otherwise be difficult to find.

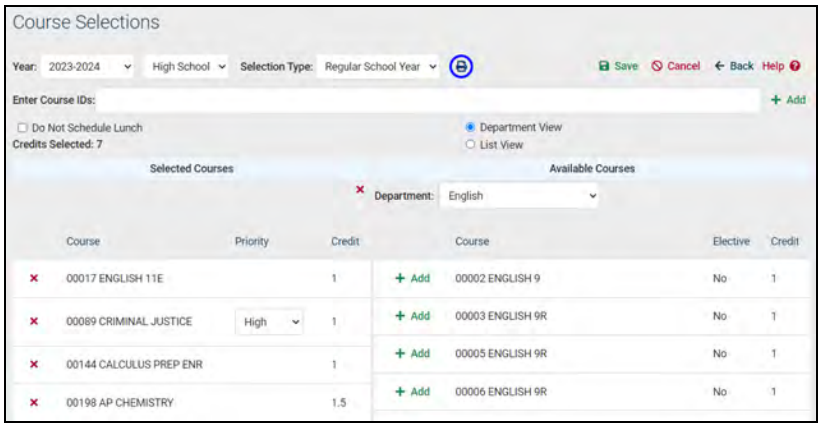
3. Using the checkboxes on the far left, check all of the courses that you would like selected for this student. You may need to scroll down to see all of the course options. Un-checking a checked box has the effect of deselecting a course selection.
4. Save your selections by clicking the green Save button at the top of the screen; you may have scroll up to see this button. Once complete, you will see a confirmation message indicating that selections were saved.

   Note: To see the list of selected course, you can switch back to **Department View** for a more consolidated list of selections.

Printing Course Selections

Once you have saved the student's requests, you may wish to print them. Simply click once on the Student Selections report icon and a report of the student's selections will appear. The report will include a Request Type column which shows whether the selected courses are associated with Summer School or the Regular School Year.

Note: This is the same report available through the **Master Schedule > Reports > Student Schedule Reports**, but here it will be run for just this student.



Student Course Selections

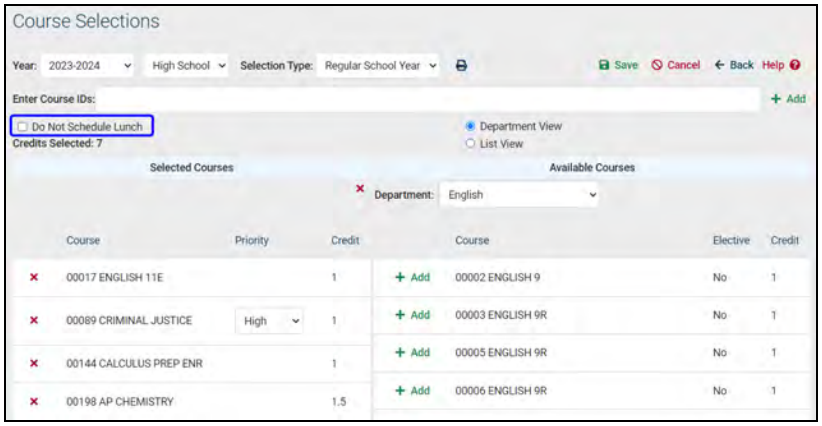
Mindex HS : High School : 2023-2024 05/20/2024

Student ID	Name & Address	Sex	Grade	DOB	Phone
31178	Ross, Elizabeth P 14 Douglas Street Rochester, NY 12345	F	10	10/03/2007	(555) 537-6750

Course #	Course Name	Priority	Credits	Request Type
00003	ENGLISH 9R	High	1.00	Regular School Year
00064	GLOBAL HIST & GEO 2R	High	1.00	Regular School Year
00120	CONSUMER MATH	High	1.00	Summer School
00143	CALCULUS PREP	High	1.00	Summer School
00180	LIVING ENVIRONMENT	High	1.00	Regular School Year
00312	HEALTH	High	1.00	Regular School Year
00322	PHYSICAL EDUCATION	High	0.50	Regular School Year
02162	SKILLS - AL/LE	High	0.00	Regular School Year
03540	INTRO DIGITAL MEDIA ART	High	1.00	Regular School Year
04268	ALGEBRA 1A	High	1.00	Regular School Year
04269	ALGEBRA 1B	High	1.00	Regular School Year
			9.50	

Using the Do Not Schedule Lunch Checkbox

Placing a check in the **Do not Schedule Lunch** checkbox will tell the builder tools not to add a lunch to this student's schedule. Students with this option checked will not have a lunch scheduled, and will show up on the **Students Missing Lunch** report after a student load has been performed. Examples would be students who opt to skip lunch in order to fit in additional courses, or for students who attend Vocational courses for half of the day and don't have time for on-campus lunch with their remaining core classes.



Note: This feature only works if you have defined courses in the Course Catalog with a Course Type set to "Lunch."

Course Selection Notes

Tip: At any time during the selection process, you may click on the **Department View** radio button for a concise list of all currently selected courses, with convenient delete ✖ buttons to remove selections.

Note: **Save your work.** When you have finished adding courses to this student's schedule, using any of the three prescribed methods, scroll back up to the top and click once on the Save button to save the student's schedule. Once complete, you will see a confirmation message indicating that selections were saved. If you navigate to another record or move to another screen without saving, the course selections (and deletions) you have just created will not be saved.

Note: Each student's Personal Information record has two additional task buttons for navigating between students when using lists. These perform the following functions, which may or may not be appropriate, depending on how many students you are entering course selections for:

- The Previous button takes you to the Personal Information record for the student who comes before this student in your list, if you selected a student from a list of results. If you are not using a list, this button will not display.
- The Next button takes you to the Personal Information record for the student who comes after this student in your list, if you selected a student from a list of results. If you are not using a list, this button will not display.

Course Selections for Projected Enrollments and Transfer Students

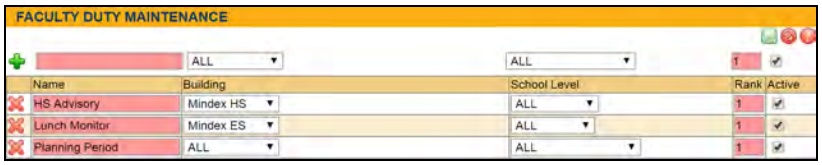
Course selections may also be added for students who have projected enrollments. This may be useful in situations where a student is transferring into the district for the following school year. Students must have a projected enrollment before course selections may be added. Refer to the Census Module documentation for more information on projected enrollments.

Scheduling > Faculty Duties

The **Scheduling > Faculty Duties** sub-module allows districts to define various teacher assignments that may be viewed on a faculty schedule as well as on the Master Schedule Whiteboard and Teachers' My Home screens. Once a duty has been created, it

can then be assigned to one or more teachers from within the Master Schedule Whiteboard.

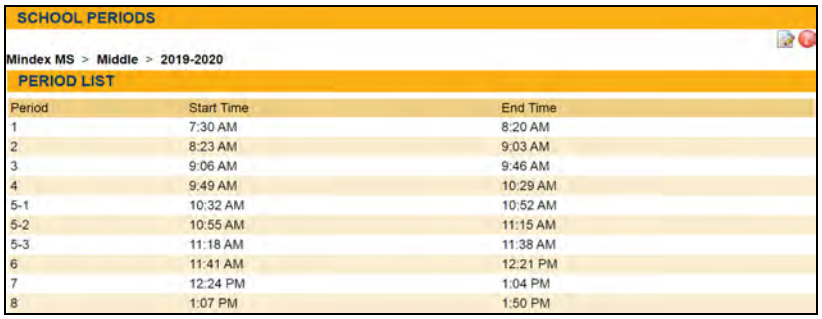
Use the Building and School Level drop-downs to narrow the scope of this view. To enter a new teacher duty, simply enter the new duty name and click the Add button to create a new row. Enter information as needed and click Save to apply any changes.



Scheduling > Period Maintenance

The Period Maintenance sub-module is responsible for tracking the period structure for a given building and year. If a period structure does not yet exist for a specified year, another year's period structure may be imported.

To add a new period structure or modify an existing period structure, click on the Edit button.



Adding a New Period Structure

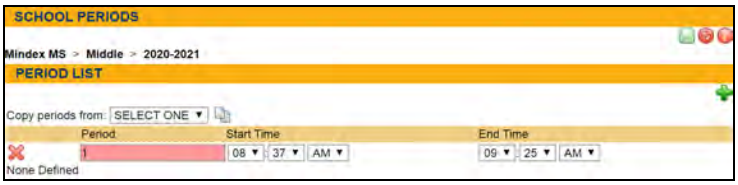
Adding a new period structure is one of the first steps in setting up a new year's schedule. If a period structure has not been set up, it is often easiest to import a copy from the previous year, and modify it as necessary.

1. Navigate to the **Scheduling > Period Maintenance** sub-module. If you do not have a Building and School Year defined in your Home module Preferences, you will be prompted to choose the building and year as well.

2. Notice the window refreshes with the message “None Defined” toward the bottom. This indicates that periods for this year have not been set up yet, and we can create periods manually, or by importing from another year.

3. Click once on the Edit button to add a period structure.

4. Use the green Add Period button to add your first period.
5. The screen will refresh with several fields where you can define the first period.



6. Edit the name of the **Period**using the pink required Period fields. Periods can be:
   A. Numeric (i.e., 1, 2, 3, etc)
   B. Alpha (i.e., A, B, C, L, etc)
   C. Alpha-numeric (i.e., A1, A2, A3, B1, B2, etc)

   Note: Each Period name is limited to 6 characters.

7. Use the drop-down lists to select the appropriate hours and minutes for each period’s start and end times.

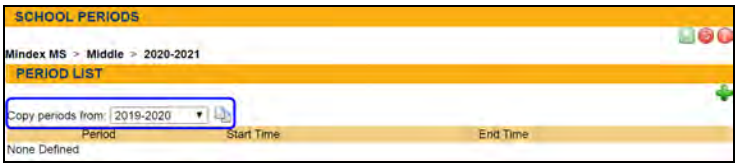
   Note: SchoolTool allows for overlapping periods, and for periods that start and end at the same time, as in the case of modular lunches.

8. Repeat these steps for each successive period.
9. Click the Save button in upper right to save this period structure.

Copying Periods from a Previous Year

1. Navigate to the **Scheduling > Period Maintenance** sub-module. If you do not have a Building and School Year defined in your Home module Preferences, you will be prompted to choose the building and year as well.

2. Click once on the Edit button to add a period structure. The screen will refresh with a “Copy periods from” drop-down list.



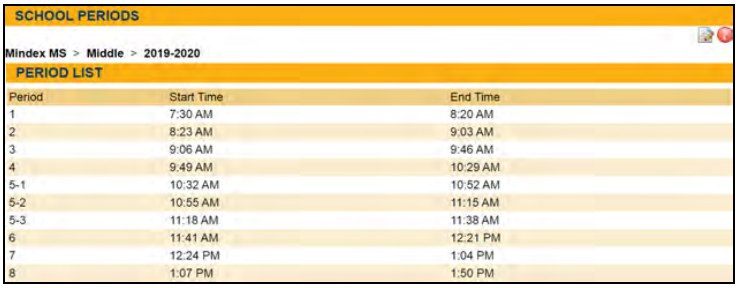
3. Select a year from the **Copy periods from** drop-down that contains a current period structure you would like to use as the master copy.
4. Click once on the **Copy Periods** button.
5. The screen will refresh with a full period structure identical to that of year you chose from the drop-down.
6. Click the Save button in upper right to save this period structure.

Editing an Existing Period Structure

Once you have a period structure that has either been imported or typed in manually, you have the ability to change it by adding periods, removing unused periods, or modifying existing periods.

Warning: If you intend to import last year's Master Schedule for use in the future year, you must copy last year's Period Structure so that the two match. (Step 1 = copy over periods and save; Step 2 = Import Master Schedule). After your Master Schedule has been imported, you may edit the names or times of the periods. However, if any edits are performed prior to the Master Schedule import, all sections will appear as supplemental (i.e. Period = NONE).

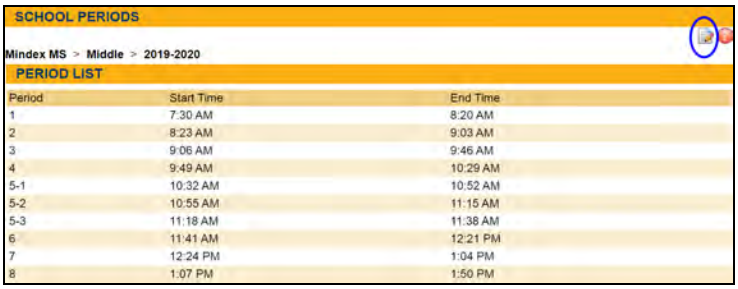
1. Navigate to the **Scheduling > Period Maintenance** sub-module. If you do not have a Building and School Year defined in your Home module Preferences, you will be prompted to choose the building and year as well.
2. Notice the window refreshes with the period list for the current building and school year in read-only mode.



Period	Start Time	End Time
1	7:30 AM	8:20 AM
2	8:23 AM	9:03 AM
3	9:06 AM	9:46 AM
4	9:49 AM	10:29 AM
5-1	10:32 AM	10:52 AM
5-2	10:55 AM	11:15 AM
5-3	11:18 AM	11:38 AM
6	11:41 AM	12:21 PM
7	12:24 PM	1:04 PM
8	1:07 PM	1:50 PM

3. Click once on the Edit button to modify the current period structure.

   The screen will refresh with many drop-downs that can be changed.



Period	Start Time	End Time
1	7:30 AM	8:20 AM
2	8:23 AM	9:03 AM
3	9:06 AM	9:46 AM
4	9:49 AM	10:29 AM
5-1	10:32 AM	10:52 AM
5-2	10:55 AM	11:15 AM
5-3	11:18 AM	11:38 AM
6	11:41 AM	12:21 PM
7	12:24 PM	1:04 PM
8	1:07 PM	1:50 PM

4. Edit the name of the **Period**using the pink required Period fields, as appropriate. Periods can be:
   A. Numeric (i.e., 1, 2, 3, etc)
   B. Alpha (i.e., A, B, C, L, etc)
   C. Alpha-numeric (i.e., A1, A2, A3, B1, B2, etc)

   Note: Each Period name is limited to 6 characters.

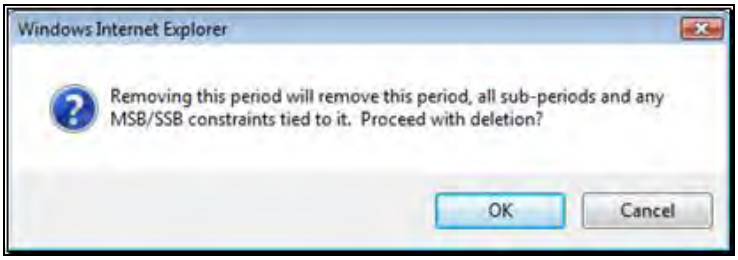
5. Use the drop-down lists to select the appropriate hours and minutes for each period's start and end times.

Period	Start Time	End Time
1	07 30 AM	08 20 AM
2	08 23 AM	09 03 AM
3	09 06 AM	09 46 AM
4	09 49 AM	10 29 AM
5-1	10 32 AM	10 52 AM
5-2	10 55 AM	11 15 AM
5-3	11 18 AM	11 38 AM
6	11 41 AM	12 21 PM
7	12 24 PM	01 04 PM
8	01 07 PM	01 50 PM

   Note: SchoolTool allows for overlapping periods, and for periods that start and end at the same time, as in the case of modular lunches.

6. **To add more periods** to the list, click on the Add Period button toward the upper right, and modify the time drop-downs appropriately.
7. **To delete periods,**click on the Delete button next to the period you would like to remove.

8. You will receive a message asking you to confirm the deletion.



Note: Deleting a period will also remove any sub-periods and any related records in the Master Schedule Builder and Student Schedule Builder Constraints.

Note: Users may *not* delete periods if they are used in the selected Master Schedule, Backups, or Special Cycle Days. In addition, users may not delete a period that is tied to daily attendance (as defined in **Maintenance > Attendance > Daily Attendance Setup**). If a period cannot be deleted for any of these reasons, the Delete ✖ button will not appear for that period.

***Note*: Sub-periods** can no longer be added in SchoolTool. Sub-periods are not supported by the Master Schedule Builder's automatic scheduling tools, but can be used without issue during a load in the Student Schedule Builder, with the exception of the study hall overlay. For schools already using sub-periods, it is recommended that these be converted to overlapping periods instead. Previously existing period structures that contain sub-periods continue to be supported, but new sub-periods may not be added.

9. When you are done editing your period structure, click on the green Save button to save your changes.

Scheduling > Remote Schedules

The **Scheduling > Remote Schedules** sub-module is used to define remote schedules that can then be assigned to individual students. Course attendance screens and homeroom attendance screens that are configured to show the Remote checkbox will default to the appropriate value (Remote or On-Site) for each student based on the remote schedule assigned to that student for that day.

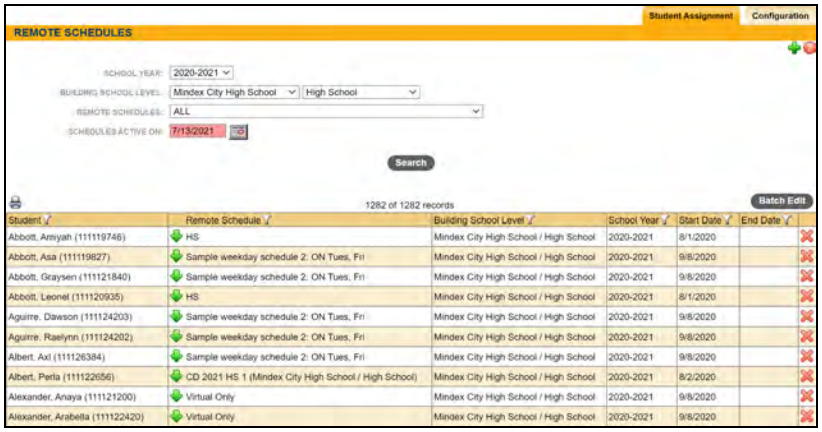
Notes about remote schedules:

- Remote schedules can be configured to function based on the actual days of the week, cycle days, or special cycle day schemes.
    - Remote schedules based on weekdays are available for all school years and building/school levels, while schedules based on cycle day or special cycle

day schemes are school year and building/school level specific.
    - Remote Schedules that are based on cycle day or special cycle day schemes should be configured *after* all changes to those schemes and cycle day assignments have been completed for a given school year. Changing schemes or scheme assignments that are already associated with Remote Schedules can cause errors in the **Scheduling > Remote Schedules** sub-module and should therefore be avoided.
- Only one remote schedule can be assigned to a student at a time; use the Start and End Date fields to specify date ranges as needed.
- Remote schedules are used to determine the *default* value of the Remote checkbox on attendance screens, but the Remote/On-Site values saved for daily and/or period attendance will reflect the actual values that were entered from the attendance screens. Keep in mind that the ability to designate attendance entries as Remote/On-Site is also based on settings in Maintenance.
- Users with permission to see student locator information may see a Remote indicator in the locator for any student who has a remote schedule assignment and is scheduled to be remote for the current day. The locator will be updated based on *actual* attendance submissions over the course of the day.

Student Assignment Tab

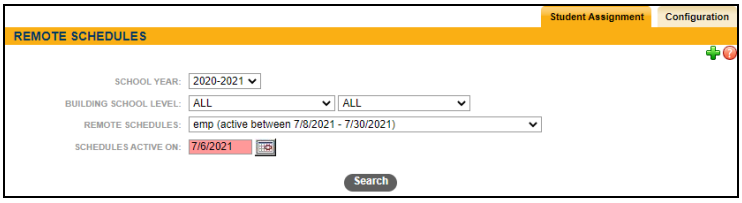
The Student Assignment tab allows users to assign remote schedules (defined on the Configuration tab) to individual students. A student may only have one remote schedule assigned at a time, although a student can have any number of schedules assigned throughout the school year as long as the dates do not overlap with other assignments.



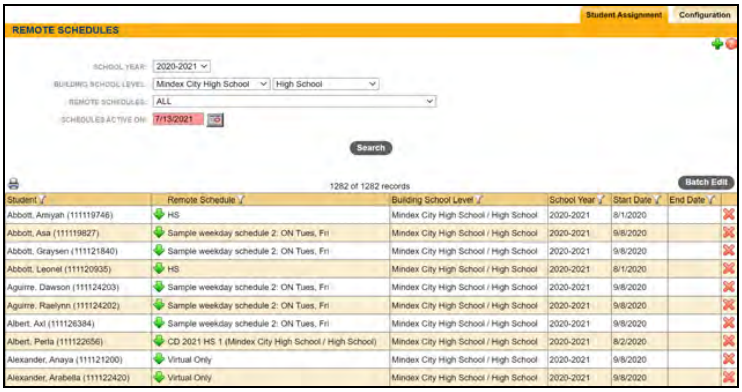
Viewing Remote Schedule Assignments

To view students' remote schedule assignments, use the filters at the top of the screen to select the desired criteria and click the Search button.

- School Year: Specifies the year for which you want to view remote schedule assignments.
- Building School Level: Specifies the location of primary enrollments of the students for whom you wish to view assignments (this can be ALL locations or you may select a specific building/school level). This filter returns students based on *official* enrollment location only.
- Remote Schedules: Specifies which remote schedule(s) you want to view (this can be ALL remote schedule assignments or only assignments for a specific remote schedule). Note that this dropdown is dependent on the School Year and Building School Level filters, and will only show schedules that match those filter selections.
- Schedules Active On: Schedules are considered active on a given date if the schedule assignment date range includes that day (including the start or end date). This date must be within the selected school year.



After selecting the appropriate filters, click the Search button to view a list of all students' remote schedule assignments. The Remote Schedule column includes the schedule name; for schedules based on cycle day or special cycle day scheme, that column also includes the building school level with which that remote schedule is associated.



Click on the Show Details ↓button for any Remote Schedule to view the daily values for each day in that schedule. The row will expand to show a grid of all daily values. To collapse it, simply click the Hide Details ↑ button.

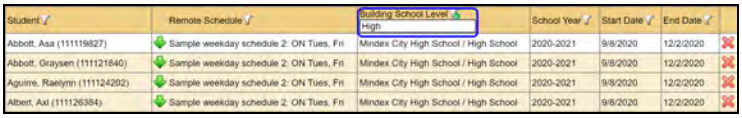
Student	Remote Schedule	Building School Level	School Year	Start Date	End Date
Abbott, Asa (111119827)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Abbott, Graysen (111121840)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Aguilar, Aubree (111125915)	Sample weekday schedule 2: ON Tues, Fri	Mindex City Middle School / Middle School	2020-2021	9/8/2020	12/2/2020
Aguirre, Dawson (111124203)	Sample weekday schedule 2: ON Tues, Fri	Mindex City Middle School / Middle School	2020-2021	9/8/2020	12/2/2020
Aguirre, Kabir (111128715)	Sample weekday schedule 2: ON Tues, Fri	Mindex Elementary 2 / Elementary	2020-2021	9/8/2020	12/2/2020
Aguirre, Raelynn (111124202)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Albert, Alyssa (111123175)	Sample weekday schedule 2: ON Tues, Fri	Mindex City Middle School / Middle School	2020-2021	9/8/2020	12/2/2020
Albert, Axl (111126384)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Albert, Erin (111126096)	Sample weekday schedule 2: ON Tues, Fri	Mindex City Middle School / Middle School	2020-2021	9/8/2020	12/2/2020
Albert, Jaxx (111125398)	Sample weekday schedule 2: ON Tues, Fri	Mindex Elementary 1 / Elementary	2020-2021	9/8/2020	12/2/2020

Monday	Tuesday	Wednesday	Thursday	Friday
Remote	On-Site	Remote	Remote	On-Site

To filter the grid based on the values in one or more columns, simply click on the Filter icon for the desired column(s). Filters will be remembered until the next time you click the Search button to reload the grid.

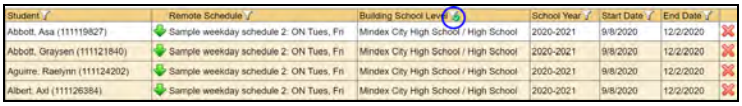
Student	Remote Schedule	Building School Level	School Year	Start Date	End Date
Abbott, Asa (111119827)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Abbott, Graysen (111121840)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Aguilar, Aubree (111125915)	Sample weekday schedule 2: ON Tues, Fri	Mindex City Middle School / Middle School	2020-2021	9/8/2020	12/2/2020
Aguirre, Dawson (111124203)	Sample weekday schedule 2: ON Tues, Fri	Mindex City Middle School / Middle School	2020-2021	9/8/2020	12/2/2020
Aguirre, Kabir (111128715)	Sample weekday schedule 2: ON Tues, Fri	Mindex Elementary 2 / Elementary	2020-2021	9/8/2020	12/2/2020
Aguirre, Raelynn (111124202)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Albert, Alyssa (111123175)	Sample weekday schedule 2: ON Tues, Fri	Mindex City Middle School / Middle School	2020-2021	9/8/2020	12/2/2020
Albert, Axl (111126384)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Albert, Erin (111126096)	Sample weekday schedule 2: ON Tues, Fri	Mindex City Middle School / Middle School	2020-2021	9/8/2020	12/2/2020
Albert, Jaxx (111125398)	Sample weekday schedule 2: ON Tues, Fri	Mindex Elementary 1 / Elementary	2020-2021	9/8/2020	12/2/2020

Enter the desired text in the field that appears (the rows will automatically filter as you type). Close the filter field by pressing Enter or by clicking outside the filter field.



Student	Remote Schedule	Building School Level	School Year	Start Date	End Date
		High			
Abbott, Asa (111119827)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Abbott, Graysen (111121840)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Aguirre, Raelynn (111124202)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Albert, Axl (111126384)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020

The Filter button will change to the Active Filter icon to indicate when a filter is active. To remove a filter, simply click on the Active Filter icon and delete the text in that field. Press Enter or click outside the filter field to update the results.



Student	Remote Schedule	Building School Level	School Year	Start Date	End Date
Abbott, Asa (111119827)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Abbott, Graysen (111121840)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Aguirre, Raelynn (111124202)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Albert, Axl (111126384)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020

Click the Print button to the upper left of the grid to access a printable view of this screen. The top portion of the report will show filter selections, including any column-level text filters that are currently applied.

Remote Schedule Student Assignments

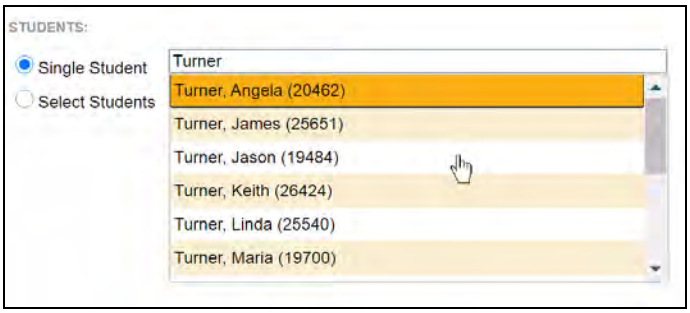
All Building School Levels
Schedules Active On: 12/1/2020
10 of 10 records

Student	Remote Schedule	Building School Level	School Year	Start Date	End Date
Abbott, Asa (111119827)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Abbott, Graysen (111121840)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Aguilar, Aubree (111125915)	Sample weekday schedule 2: ON Tues, Fri Monday: Remote; Tuesday: On-Site; Wednesday: Remote; Thursday: Remote; Friday: On-Site	Mindex City Middle School / Middle School	2020-2021	9/8/2020	12/2/2020
Aguirre, Dawson (111124203)	Sample weekday schedule 2: ON Tues, Fri	Mindex City Middle School / Middle School	2020-2021	9/8/2020	12/2/2020
Aguirre, Kabir (111128715)	Sample weekday schedule 2: ON Tues, Fri	Mindex Elementary 2 / Elementary	2020-2021	9/8/2020	12/2/2020
Aguirre, Raelynn (111124202)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Albert, Alyssa (111123175)	Sample weekday schedule 2: ON Tues, Fri	Mindex City Middle School / Middle School	2020-2021	9/8/2020	12/2/2020
Albert, Axl (111126384)	Sample weekday schedule 2: ON Tues, Fri	Mindex City High School / High School	2020-2021	9/8/2020	12/2/2020
Albert, Erin (111126096)	Sample weekday schedule 2: ON Tues, Fri	Mindex City Middle School / Middle School	2020-2021	9/8/2020	12/2/2020
Albert, Jaxx (111125398)	Sample weekday schedule 2: ON Tues, Fri	Mindex Elementary 1 / Elementary	2020-2021	9/8/2020	12/2/2020

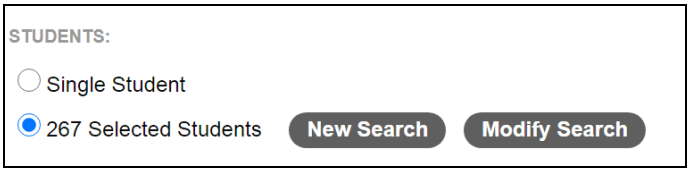
Adding Remote Schedule Assignments

To add a remote schedule assignment for a student, click the Add ➕button and locate the appropriate student(s):

- To add an assignment for students one at a time, choose Single Student and simply type part of the student's name or ID. A list of potential matches will appear as you type; click the appropriate student from the list to select that individual.



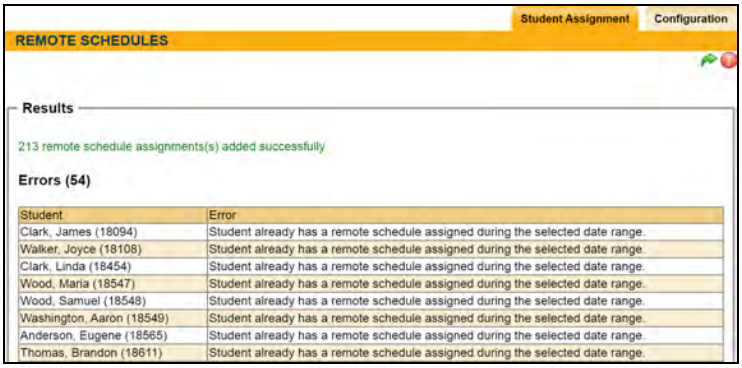
- To add identical assignments for a group of students in a single operation, choose the Select Students option and use the batch selector to search for the desired group of students.



Once you have selected one or more students, specify the remote schedule information and click Save:

- **School Year**: Select a school year for which you'd like to add remote schedule assignments. This selection is also used to determine which remote schedules are available in the next dropdown.
- **Remote Schedule**: Choose a schedule from the dropdown. This dropdown provides a list of all schedules that are currently available from the Configuration tab for the selected school year. Keep in mind that remote schedules based on cycle day or special cycle day schemes are building school level specific and can only be added for students who have a primary enrollment in that location for the selected dates.
- **Start Date/End Date:** These dates represent the start and end dates for the remote schedule assignment. Start Date is required; End Date is optional and may be left blank for ongoing, current schedule assignments (unless the selected remote schedule is based on a special cycle day scheme, in which case End Date is also required). Both dates must be within the same school year (if you've selected a schedule that's based on special cycle day schemes, both the Start *and* End dates are required must be within the active dates of the special cycle day scheme).

After clicking Save, the screen will display the results of the operation, including the number of successes as well as a detailed list of any failures.

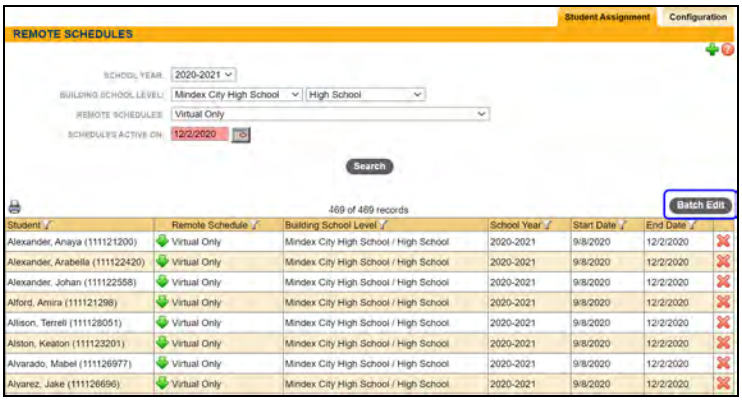


Once this operation is complete, you may click the Done button to return to the Student Assignments tab.

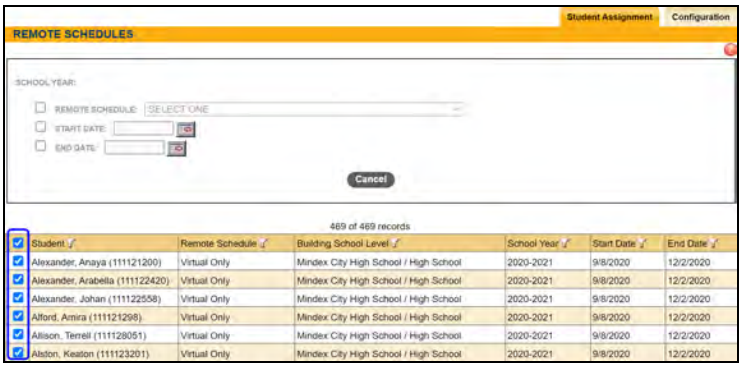
Modifying or Removing Schedule Assignments

To modify existing student assignments, click the **Batch Edit** button to the upper right of the grid.

Note: Batch editing a large amount of records at once may cause performance delays when loading and/or saving results. To avoid this, it is recommended that users apply filters to limit the number of records being edited to less than 4,000 records in a single operation.



When in edit mode, use the checkboxes in the grid to select the students to be updated.



Use the individual field checkboxes at the top of the screen to indicate which fields you wish to change and specify the values to be applied to the students you selected. Note that if you select a remote schedule based on a special cycle day scheme, start and end date are required and will be automatically selected to ensure that the assignment dates are within the active dates of the scheme.

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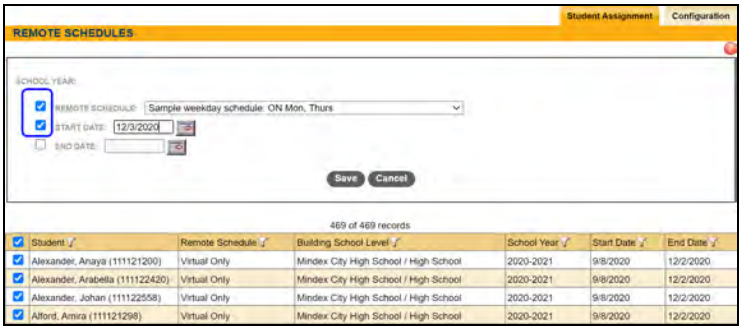
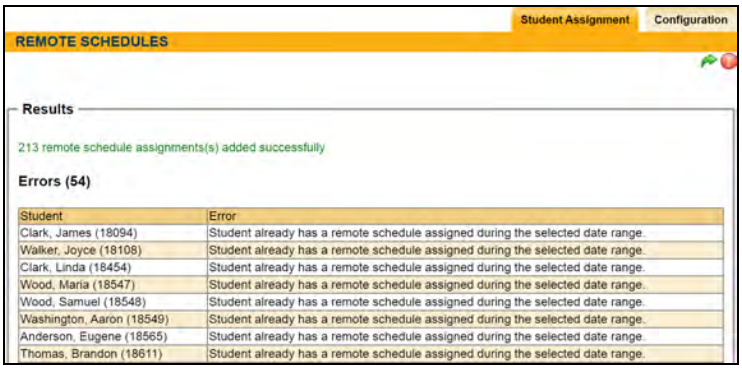


Click Save to complete the operation. The screen will display the results of the operation, including the number of successes as well as a detailed list of any failures. Because schedules based on cycle day and special cycle day schemes are building school level specific, these can only be assigned to students who have a primary enrollment in the corresponding location for the selected dates; students whose enrollments are not in that location and/or date range will return an error and will not be assigned.

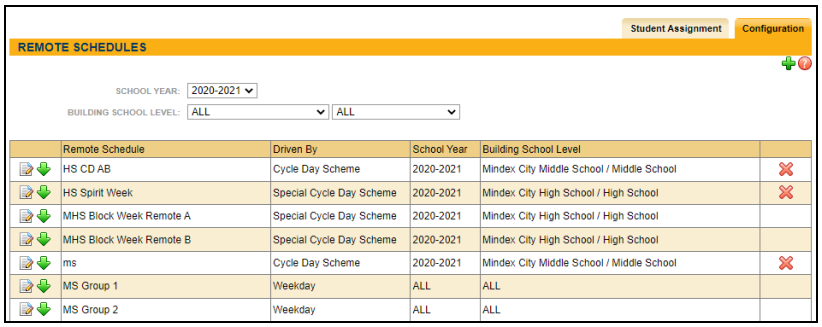


To completely remove an existing student assignment, click the Delete ✖ button on the right side of the row. You'll be prompted to confirm the deletion and the data will be permanently removed.

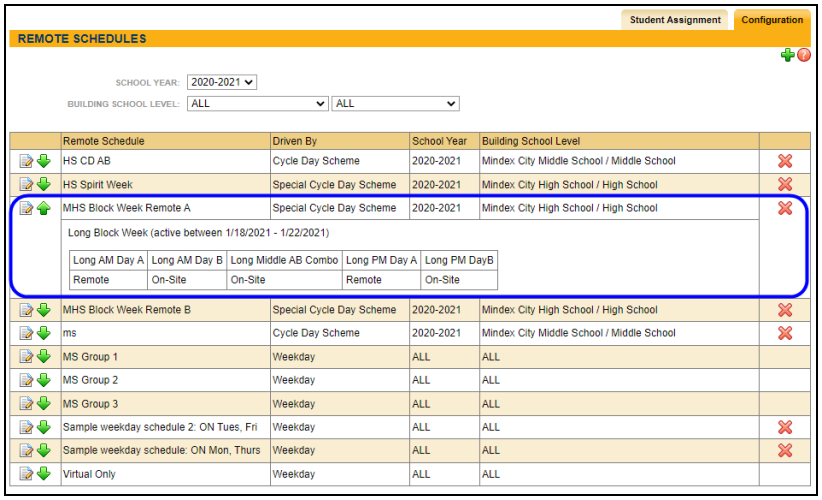
Configuration Tab

The Configuration tab is where districts can define any number of remote schedules that can then be assigned to students in the district.

When viewing the Configuration tab, users will see two sets of filters at the top of the screen. The School Year dropdown begins with 2019-2020 and shows all years through the next school year. The Building School Level dropdowns respects all building rights as well as any user preferences.



Click on the Show Details button for any Remote Schedule to view the daily values for each day in that schedule. The row will expand to show a grid of all daily values. To collapse it, simply click the Hide Details button.

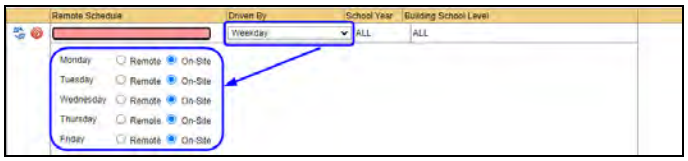


To add a new configuration, start by using the filters at the top of the screen to ensure that you're working in the correct school year. Click the Add button in the upper right of the screen. A new row will appear at the top of the grid.

Enter the details for the new remote schedule configuration:

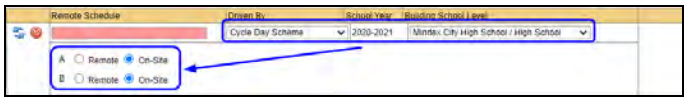
1. **Name**: Enter a name for the new configuration. Names must be unique per school/building school level.
2. **Driven By, School Year, and Building School Level**: Choose whether this schedule should be driven by weekday, cycle day scheme, or special cycle day scheme.
    - **Weekday**: When this option is selected, the school year and building school level values will be set to "ALL" because Weekday schedules are available for any school year/location.

      You'll see Remote/On-Site radio buttons for each day of the week.



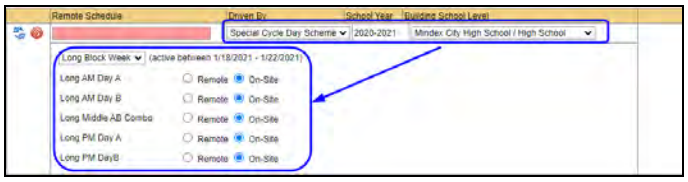
- **Cycle Day Scheme**: When this option is selected, the building school level dropdowns will include only those locations that have cycle day schemes defined for the selected school year.

  You'll see Remote/On-Site radio buttons for each cycle day in the active cycle day scheme for the selected building school level.

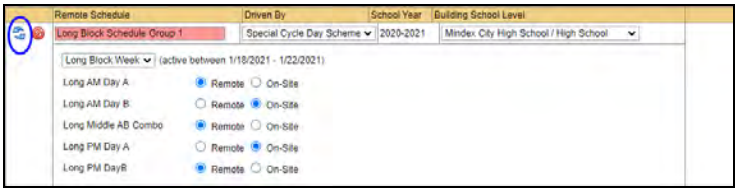


- **Special Cycle Day Scheme**: When this option is selected, the building school level dropdowns will include only those locations that have one or more special cycle day schemes defined for the selected year.

  If that location has more than one special cycle day scheme available, you'll need to select the desired scheme before continuing. Once you've selected a special cycle day scheme, you'll see text indicating the active dates for that scheme, as well as Remote/On-Site radio buttons for each date in the selected scheme.

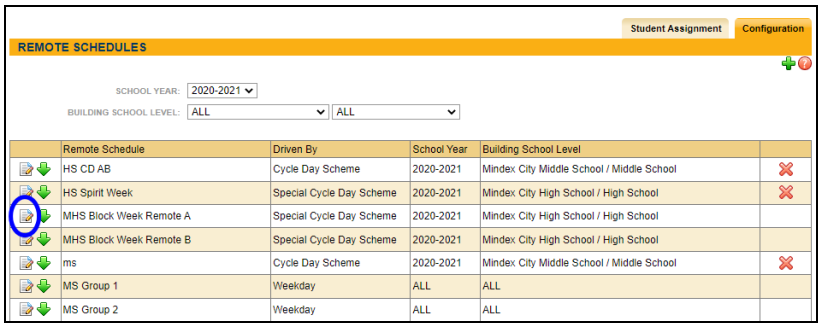


3. Use the radio buttons to specify the daily values for this Remote Schedule and click the Save Remote Schedule button to finish.

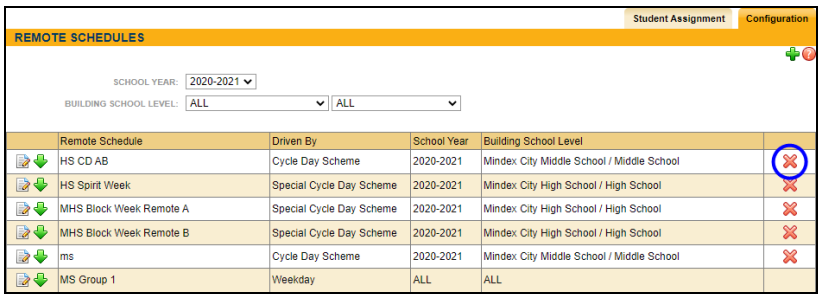


4. The grid will automatically refresh to show the new Remote Schedule in the list (the grid is sorted alphabetically by schedule name).

To modify an existing Remote Schedule, click the Edit button in the row you wish to modify and update as needed (only the name and day values can be modified for existing schedules). Remember that editing a remote schedule will modify it for *all* students who are assigned to that schedule.



To delete, click the Delete ✖ button on the right side of the row you wish to remove. Keep in mind that schedules cannot be deleted if they have been assigned to students; to remove a schedule in that situation you must first remove all student assignments from that schedule.



Scheduling > Room Usage Report

The Room Usage Report provides information on how rooms have been scheduled, and is a useful report when searching for a free room or verifying the class schedule for a room.

Users have two ways to report information:

- **By Room**: will display the courses taking place in the selected room, period by period;
- **By Period**: will display all of the rooms (either Available or Unavailable) for the selected period, and their seat capacities.

To access the Room Usage Report

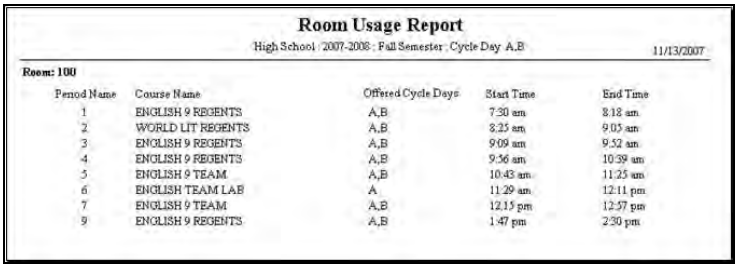
1. From within the Scheduling module, select the Room Usage Report sub-module from the menu at left.
2. From the drop-downs, select the School Level and School Year you will be working with.
3. Select the Semester to narrow your results, or select ALL to include all semesters from that year.
4. Select the Cycle Day(s) you wish to report on. You must select at least one.

   Note: You can only run this report for a single room or a single period at a time.

To Generate the Report by Room

1. Select the **Room**radio button under **Report By**.
2. Select the room number from the **Search By**drop-down.

3. Click Run Report.



Room Usage Report

High School : 2007-2008 : Fall Semester : Cycle Day A,B 11/13/2007

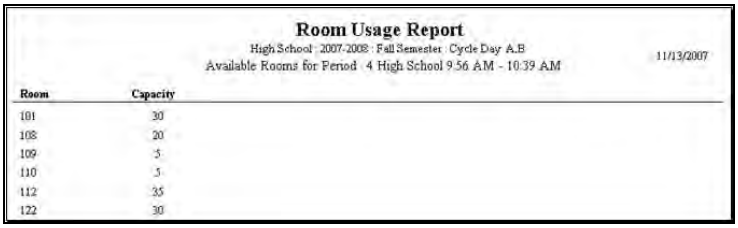
Room: 100

Period Name	Course Name	Offered Cycle Days	Start Time	End Time
1	ENGLISH 9 REGENTS	A,B	7:30 am	8:18 am
2	WORLD LIT REGENTS	A,B	8:25 am	9:03 am
3	ENGLISH 9 REGENTS	A,B	9:09 am	9:52 am
4	ENGLISH 9 REGENTS	A,B	9:56 am	10:39 am
5	ENGLISH 9 TEAM	A,B	10:43 am	11:25 am
6	ENGLISH TEAM LAB	A	11:29 am	12:11 pm
7	ENGLISH 9 TEAM	A,B	12:15 pm	12:57 pm
9	ENGLISH 9 REGENTS	A,B	1:47 pm	2:30 pm

To Generate the Report by Period

1. Select the **Period**radio button under the **Report By**.
2. Select the period from the drop-down list under the **Search By**options.
3. Select the appropriate radio button for Available or Unavailable.

4. Click Run Report.



Room Usage Report

High School : 2007-2008 : Fall Semester : Cycle Day A,B

Available Rooms for Period : 4 High School 9:56 AM - 10:39 AM

11/13/2007

Room	Capacity
101	30
108	20
109	5
110	5
112	35
122	30

Scheduling > Selection Maintenance

The Selection Maintenance sub-module allows you to add, edit and remove course selections or recommendations for multiple students at the same time. The Selections option allows users to locate a group of students and add, modify, or remove course selections for those students in a single operation. The Recommendations option allows users to review teacher-submitted course recommendations and mark those recommendations as approved where appropriate.

Using the Batch Selector, users can isolate a group of students, such as those in a grade (i.e. all outgoing 8th graders will get 9th grade English, Science and Social Studies), or those in a team (i.e. all those on Team AP get English Honors, Math Honors and Science Honors courses for their grade level) and then perform a scheduling task.

After locating a group of students, an administrator will be able to add and remove course selections for all found students at once, as well as modify any current course selections.

1. The first step in using the Selections option is always to locate the students that you would like to make course selection changes for. You will also need to select the school level and year where the course selection will be made. To begin, click the Selections option and use the Batch Selector to locate a group of students who will all have the same modifications to their course selections.

   Tip: Locate students that all have something in common like a currently scheduled course, a team, or a grade, by using the Batch Selector terms such as Master Schedule, Team, Enrollment, or Program Service. For more specifics on using the Batch Selector, refer to the Batch Selector User Guide.

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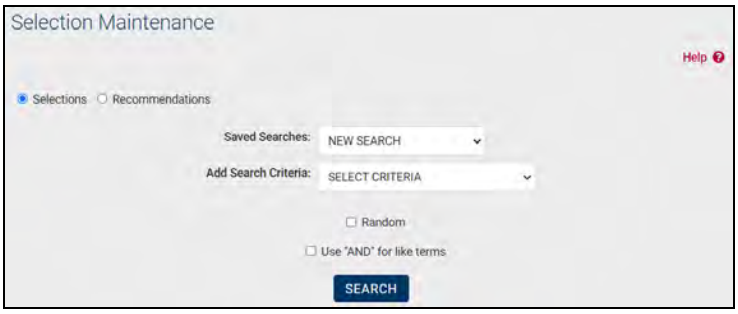


2. When the list results, verify all the students in the list will get the course selections, deselecting any that should not be scheduled for this course, and click the **Continue**button.

   The screen will refresh with a list of school levels where the students will attend the course.

3. Select ❯a School Level and School Year to locate the course catalog you wish to select from.

   The screen will refresh with three (3) options for modifying course selections.

Once you have located the group of students you are going to modify, and have selected both a building and a year for the course selections, you have several options:

- Add selections: This entails locating a course that all of the selected students should be taking in the target year, and adding it to all selected students simultaneously.
- Edit Selections: This entails exchanging a current course selection for a new course selection for the group of students. This is the same process, logically, as removing a course selection and adding another, though it saves us steps.
- Remove Selections: This allows us to, for our group of students, remove a selection that should not be there, or is no longer offered.

Adding Course Selections

Before adding course selections, ensure the desired Selection Type is chosen. Course selections can be associated with either the Regular School Year or Summer School by

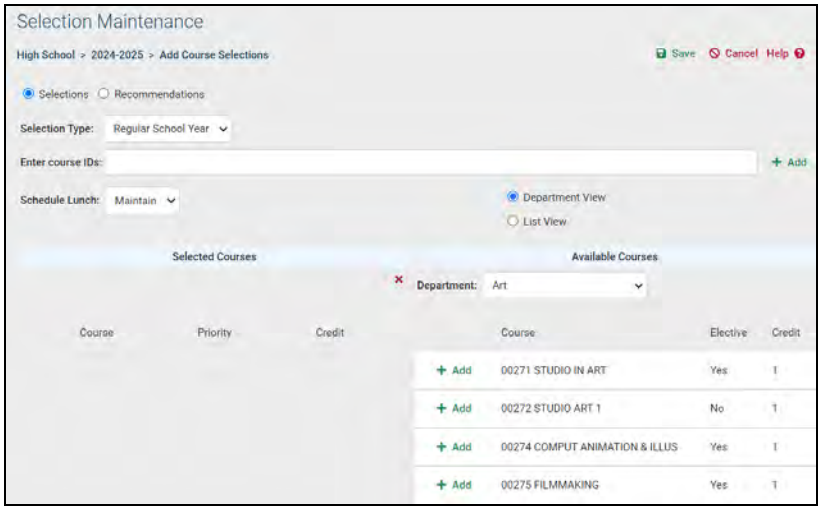
using the Selection Type drop-down. This is primarily used when running scheduling tools, such as the Student Schedule Builder. It can also be used for purely informational purposes. In general, it is recommended to leave this set to Regular School Year unless you have been directed otherwise.

To add course selections to the currently selected list of students, select the applicable courses using one of the methods described below (by Course ID, in Department View, or in List View) and save your changes. Remember that you may use any of these techniques in any combination.

Course selections can only be made for courses that are listed as active in the specified year's Course Catalog; if a course is not active, or if the course has no Yearly Information attached to it, then selections for the course cannot be made. For example, courses designated as a Course Type of Study Halls or Lunch will not have Yearly Information, so it is not possible to make selections for these courses.

Additionally, selections cannot be entered for any course that has been linked to another course in the Course Catalog (such as a lab that is linked to a Science course).

Course selections may be made for any school year, though they only have impact when the automatic scheduling tools are run for the year in which selections have been made.

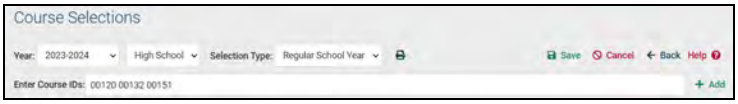


Select Courses by Course ID

Selecting courses by ID number requires that you are familiar with the numbers of the courses to be selected, not just the names. You may have a copy of the Course Catalog, a paper copy of the student's selections, or simply remember the appropriate course numbers.

If you mistype a course number, it is an easy process to confirm and remove the selection.

1. Locate the **Enter course IDs**text box and type in the series of course numbers, **separated by spaces.**



Note: The course numbers you enter will be searched for in the selected School Level. As soon as a single course selection is made, this drop-down will become grayed out, assuming that the rest of the student requests will be made from the same School Level Course Catalog.

Tips: Course numbers must be entered “strictly.” To minimize errors, SchoolTool expects users to adhere to the following rules:

- Course numbers must be exact matches. If a course has a leading zero in the Course Catalog, for instance, it must have one here to be a match.
- Some courses may have text (letters) as well, these must match too.
- Spaces are the only delimiters (dividers) allowed. Commas, semicolons, and other characters should not be used unless they are part of the Course ID. “123, 456” will not select the two courses as expected, though “123 456” will.
- Courses that have spaces in the course number, like “655 A” instead of “655A” or “655-A” cannot be selected with this method, as the space is used as our delimiter.

  Note: If the student requires two or more selections of a course, and the course is set up to Allow Multiple Course Selections in the Course Catalog, you can enter the course number multiple times and it will be added as many times it is selected. An example of this might be a student who has to double up on Phys Ed in order to graduate.

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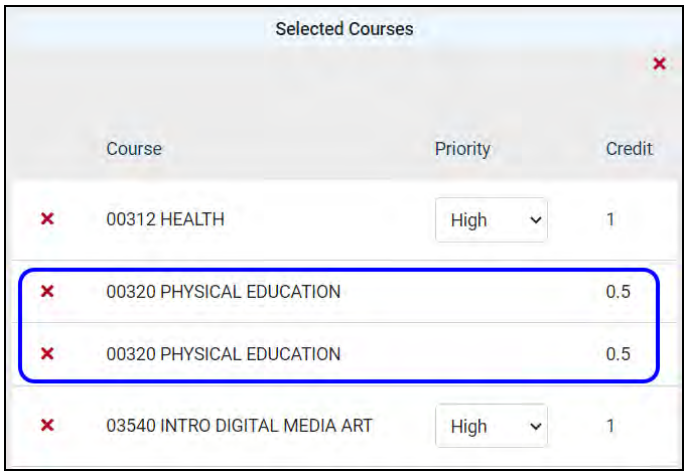
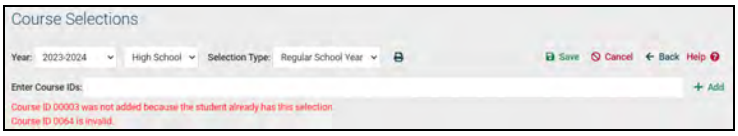


2. Click once on the Add ➕button at the end of the entry field to add the courses to the student's selections.

   The screen will refresh, taking all of the course numbers and converting them to a list of courses in the left hand column, labeled "Selected Courses".

3. Examine your results.

   Any problems discovered while adding the courses will be displayed, in red, above the course selection results. Typically, courses that have already been added, that don't exist, or that were entered wrong (i.e., typed with a comma or missing their leading zero) will trigger these error messages.



   Note: It is not possible to add duplicate course requests, unless the course is setup to allow multiple selections in the Course Catalog. See for more information.

4. If a course is designated in the Course Catalog as an Elective, a priority drop-down will appear to the right of the course name.

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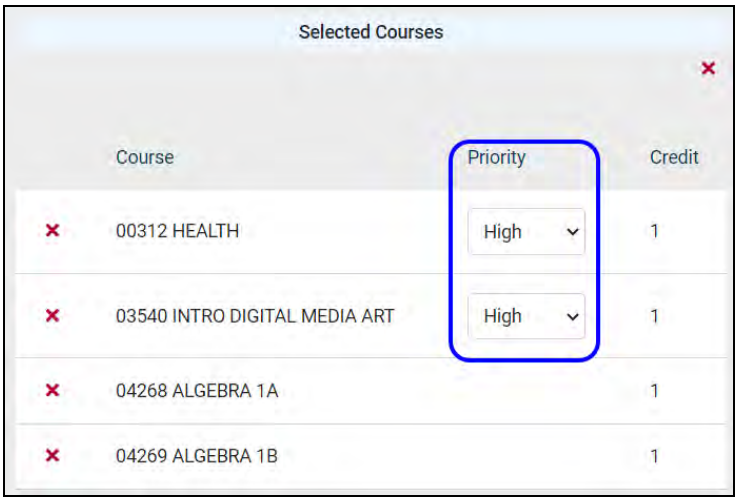


The priorities you select here are used by the automatic schedule builder tools to place a student in the preferred course in the event of a scheduling conflict.

Some schools, such as middle schools, may not have electives defined, so these priority drop-downs may never be seen.

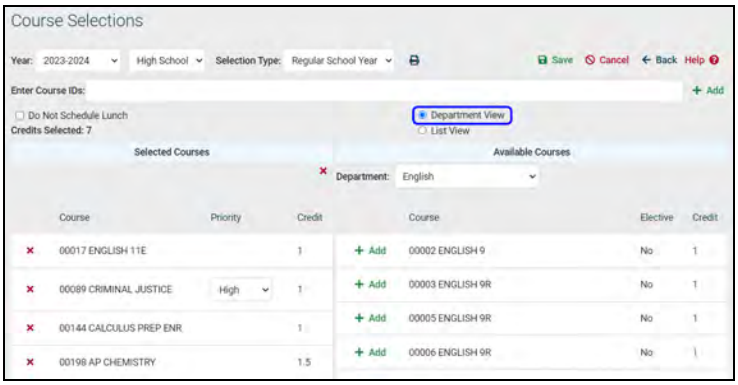
5. Save your selections by clicking the green Save button at the very top of the student record; you may have to scroll up to see this button. Once complete, you will see a confirmation message indicating that selections were saved.

   Note: Selections are not saved automatically, so moving to the next student in the list without clicking on the Save button will result in the loss of any current selection changes.

Select Courses by Department

Selecting courses by department allows the administrator to browse course options by individual department without having to see all courses in all departments. This may aid the administrator when, for instance, trying to select the best English course for a student.

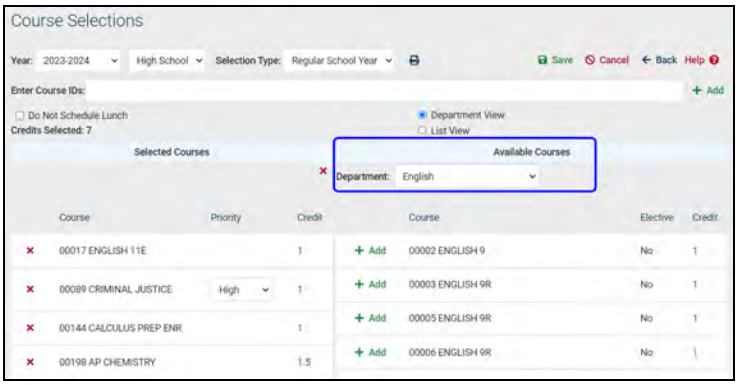
1. Select the **Department View**radio button in the course selection area. This is the default option, so it may already be selected.



Note: The corresponding list of Available Courses will be based on the selected School Level. For example, you may have Art courses in both the Middle School and High School, but only those in the selected level will display.

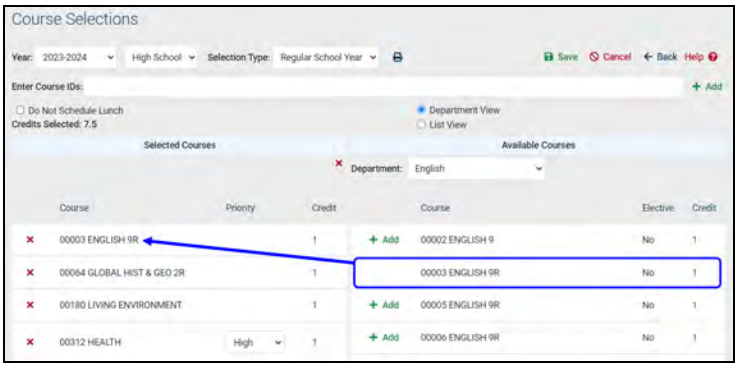
2. Locate the course to be selected by choosing its department from the **Department**drop-down list.

   The screen will refresh to show all available courses for that department in the selected School Level.



Note: There are two types of courses in this list: Core and Elective. Core courses have a value of **No** in the Elective column; electives have a value of **Yes**.

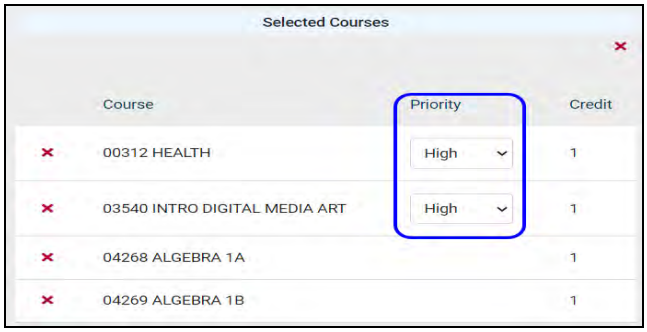
3. Click once on the green Add ➕button to the left of the course you would like to select, under the Available Courses section. The screen will refresh showing the selected course on the left side, under the **Selected Courses**tab.



Note: The course name still appears in the Available Courses list, though the Add button is no longer visible, making it impossible to add a course twice. However, if the course is set up to Allow Multiple Course Selections in the Course Catalog, the Add button will remain visible, allowing the user to add the course numerous times. An example of this might be a student who has to double up on Phys Ed in order to graduate.

Note: The Available Courses list is in order of Course Number, not by grade or course name.

4. Continue using the **Department**drop-down list and the Add buttons to move courses from the **Available Courses**list to the **Selected Courses**list.
5. If a course is designated in the Course Catalog as an Elective, a priority drop-down will appear to the right of the course name.



6. The priorities you select here are used by the automatic schedule builder tools to place a student in the preferred course in the event of a scheduling conflict.

   Some schools, such as middle schools, may not have electives defined, so these priority drop-downs may never be seen.

7. Save your selections by clicking the green Save button at the very top of the student record; you may have to scroll up to see this button. Once complete, you will see a confirmation message indicating that selections were saved.

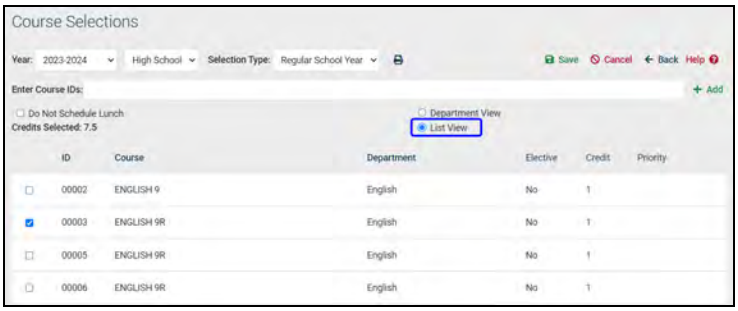
Note: Selections are not saved automatically, so moving to the next student in the list without clicking on the Save button will result in the loss of any current selection changes.

Select Courses by List

Selecting courses by the list view allows an administrator to see all active courses in all departments on the screen simultaneously, and to use a series of checkboxes to select courses for each student.

The list of checkboxes can easily be sorted in different ways (by course, by course ID, and by Department) to make the selection easier.

1. Select the **List View**radio button in the course selection area.



2. The screen will refresh with the full list of courses for the selected School Level, displayed with their IDs and course names, checkboxes for selecting or deselecting, and other details, such as Department, Elective, Credits and Priorities. This list may be long and take a few seconds to refresh, as it contains every course that is active in the Course Catalog.

   Note: There are two types of courses in this list: Core and Elective. Core courses have a value of **No** in the Elective column; electives have a value of **Yes**.

   Tip: The default display order for the list of courses is numerically by course ID. However, the first three columns (ID, Course, and Department) can all be sorted by clicking once on any of their column headings. Clicking a second time on the same column heading will sort the list by that column again, but in descending order. Sorting in this manner allows the administrator to more easily locate courses that may otherwise be difficult to find.

3. Using the checkboxes on the far left, check all of the courses that you would like selected for this student. You may need to scroll down to see all of the course options. Un-checking a checked box has the effect of deselecting a course selection.

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4. Save your selections by clicking the green Save button at the top of the screen; you may have scroll up to see this button. Once complete, you will see a confirmation message indicating that selections were saved.

   Note: To see the list of selected course, you can switch back to **Department View** for a more consolidated list of selections.

Editing Course Selections

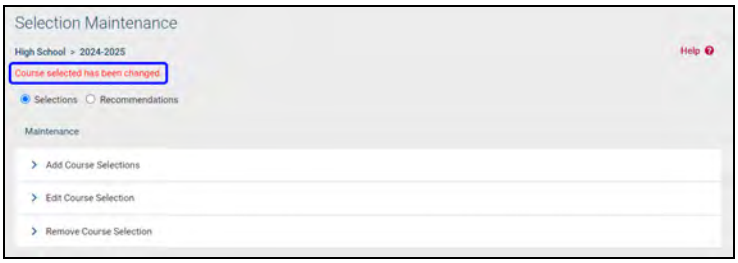
To edit course selections for the currently selected list of students, click the Select button next to "Edit Course Selection." The screen will refresh with drop-down lists for courses to be removed, and those to be added.

1. Select the course you wish to **remove**from the “Select Course to Remove” drop-down list and wait for the screen to refresh.

2. Select the course you wish to **add**from the “Select Course to Add” drop-down list.

   Note: The "Select Course To Remove/Add" drop-downs contain alphabetical lists of every course in the course catalog, so it may be necessary to scroll down to find the course(s) you are looking for.

3. Save this selection modification by clicking once on the Save button in the upper right corner.
4. The screen will refresh returning you to the Selection Maintenance screen, where you can select another option for this same group of students.



5. Notice the text “Course selected has been changed” displays in red at the top of the screen when the course selection changes have been saved.
6. You may continue to use the options here to “Add”, “Edit”, or “Remove” course selections for all of your selected students.

Removing Course Selections

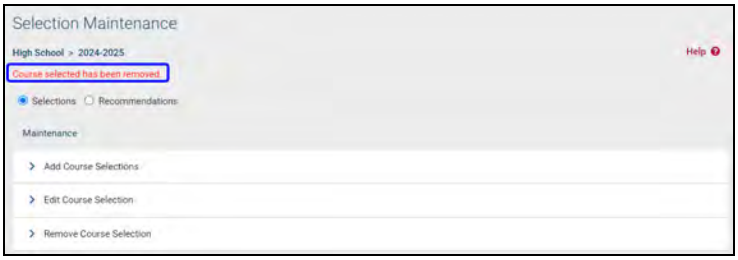
1. Click the Select > button next to “Remove Course Selection.”
2. The screen will refresh with two drop-downs.

   Choose the Selection Type the selections you want to remove are associated with. The Select Course list contains all active courses for the previously selected building and year.

3. Select the course you wish to remove from the **Select Course**drop-down list.

   Note: The Select Course drop-down contains an alphabetical list of every course in the course catalog, so it may be necessary to scroll down to find the course you are looking for.

4. Save this selection modification by clicking once on the Save button in the upper right corner.
5. The screen will refresh returning you to the Selection Maintenance screen, where you can select another option for this same group of students.



6. Notice the text “Course selected has been removed” displays in red at the top of the screen when a course has been successfully removed for the students.
7. You may continue to use the options here to “Add”, “Edit”, or “Remove” course selections for all of your selected students.

Selection Maintenance Notes

Note: **Students will never have duplicate redundant requests:** Students can only have a single request for a specific course, so duplicate requests for a student for the same course will result in only a single request for that course. No error will result in making these redundant requests. ***The only exception*** to this is when a course is marked as "Allow Multiple Course Selections" in the Course Catalog. In this case, students will receive as many requests as you give them, which will allow the automatic builder tools to place the student into multiple sections.

Note: **Gender specific designations are enforced:** If the course that is being added or removed is *gender-specific* (i.e., Phys Ed for boys), SchoolTool will adhere to the gender rules as specified in the Course Catalog. So boys will never be added to classes, like Phys Ed, that are specifically for girls only.

Note: **Remove selection only works for students who have the selected course:** If a request is removed from a group of students, but all students do not have the course, then those students will be ignored, and the “remove selection” operation will be performed only for those students that have the request.

Note: **Edit selection only works for students who have the course to be removed:** If an Edit Course Selection is performed on students that do not have the course listed in “Select Course to Remove”, the students will not be assigned the new selection in “Select Course to Add”. Students must have the course to be removed in order to receive the course to be added.

Note: Once you have a group of students selected, you may make many changes using the Selection Maintenance window to Add, Edit, and Remove course selections for these students. To work with a new group of students, click once on the **Selection Maintenance** sub-module on left side of the screen.

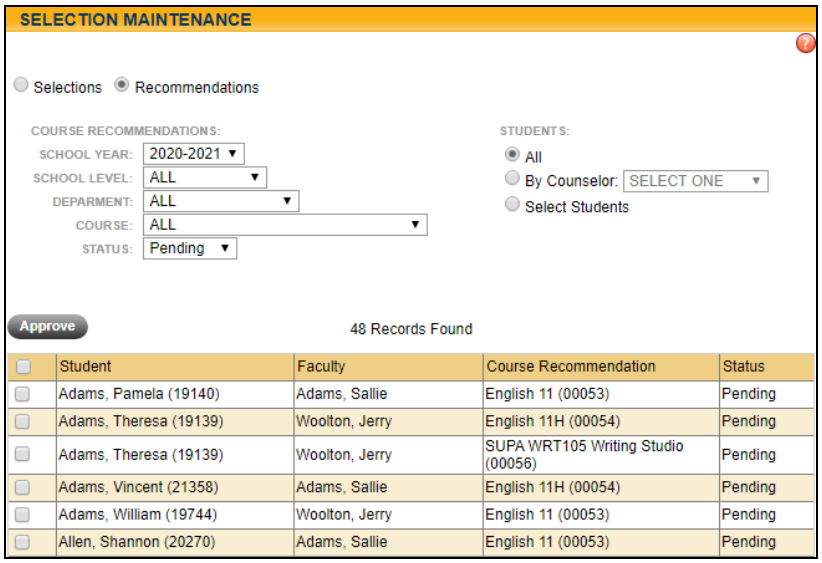
Note: There is no way to batch add the "Do Not Select Lunch" checkbox option for multiple students. This must be done student by student through the Course Selection area.

Recommendations

The Recommendations screen allows users to review teacher-submitted course recommendations for the upcoming school year and mark those recommendations as approved where appropriate. When a recommendation is approved, a course selection will automatically be created for that student for the approved course.

To view recommendations, use the filters at the top of the screen to locate the students and/or courses you wish to view. Keep in mind that recommendations are generally

submitted for the upcoming school year, rather than the current year. By default this screen shows only pending recommendations. To include recommendations that have already been approved, use the Status drop-down.



To approve recommendations, use the checkboxes to the left of each row to select the appropriate recommendations and click the **Approve** button above the grid. The selected rows will be marked as "Approved" and new course selections will automatically be created for each student.

Note: If a student already has selections for a given course, new selections will not be created for it unless the course is set to allow multiple selections in the course catalog.

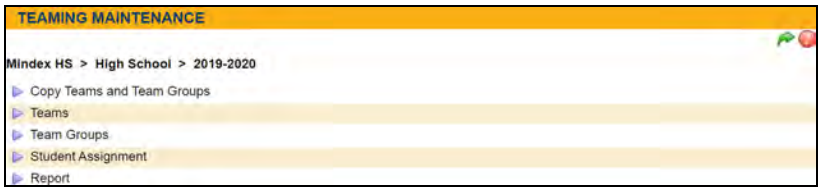
Scheduling > Teaming Maintenance

The Teaming Maintenance sub-module is used to create and manage teams and team groups for scheduling purposes. Teams and groups are then assigned to sections in the master schedule, and when the Student Schedule Builder is run, students are given the appropriate schedule for their team.

At the middle school level, this is often used with block scheduling and platooning. Students are placed into any number of sections defined for their teams, yet can also be mixed with larger groups for courses such as specials or phys ed.

At the elementary school level teams are used to create schedules based on tracking, where students get courses based on their homerooms. As students move from homeroom to homeroom, their schedules can also be automatically updated.

From within the Teaming Maintenance Sub-module, we have five options, each selectable with the blue select ❯ button:



1. Copy Teams and Team Groups: Here we can copy the team structure from any previous year that had teams, to the current year. Teams can then be modified as needed and populated with students. If there are no teams from the previous year, a message will appear alerting you that there are no teams to copy over.
2. Teams: In SchoolTool, teams are the smallest groups of students that we need for scheduling purposes. Students can only belong to one team, but can be part of multiple team groups. Here we have the ability to edit existing teams, create new ones, and delete those that we do not need.
3. Team Groups: Team groups allow us to add multiple teams to a single named group, such that students may be referred to and scheduled by their team or by their team group. Team groups can be used in the same ways that teams are used.
4. Student Assignment: Here we populate our teams with students, based on Batch Selector criteria.
5. Report: Here we can print out all of the teams and the students that are on them, or determine which students are not currently assigned to a team.

Copy Teams

Copying teams allows an administrator to simply roll over all of the team information from a previous year to the current year, saving a great deal of time in configuring teams manually.

Student membership to teams does not copy forward, as students will be in different grades, grade levels, and years, though we have the ability, with the Batch Selector, to select groups of students based on their team membership in a previous year.

Note: It is not possible to roll over teams to the current year if teams did not exist in a past year.

1. From within the Teaming Maintenance sub-module, use the select ❯ button next to **Copy Teams and Team Groups.**

2. The screen will refresh asking you for a year that you would like to copy the teams **from**.

   Note: If you select this option but have already imported teams or have created any teams manually, you will receive a message telling you that you cannot copy teams in to the current year. This is to protect us from accidentally overwriting existing teams.

3. If you would still like to copy teams into the current year, it will be necessary to remove all existing teams first, and then return to this menu option.

4. From the **Copy Teams and Team Groups From**drop-down list, select the year that you would like to copy teams from.

5. Click once on the green Save button to perform the copy.

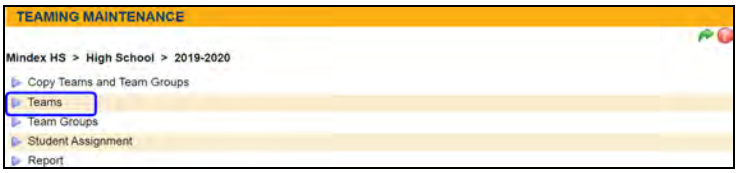
6. All of the selected year's teams and team groups will be copied forward to the current year (or the year that was selected as you entered the Teaming Maintenance sub-module).

7. The screen will refresh back to the Teaming Maintenance main menu.

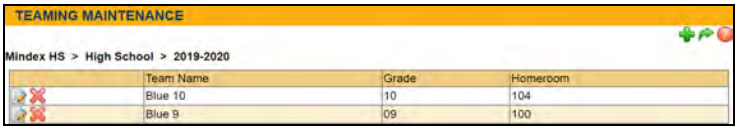
Defining and Modifying Teams

Adding, modifying, and removing teams and team properties can be done using the **Teams** option from within the Teaming Maintenance sub-module.

1. Click once on the blue Select > button from within the Teaming Maintenance sub-module.



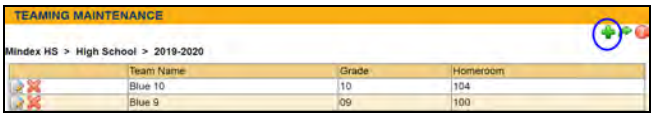
2. The screen will refresh with a list of all existing teams with columns for their Grade and Homeroom associations, if these have been defined.



Adding and Editing Teams

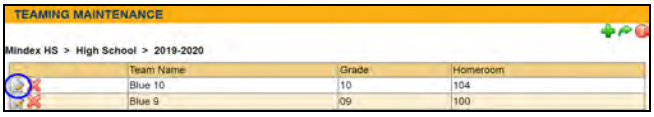
Adding a new team from scratch is a nearly identical process to editing an existing team.

1. From within the Teams option of the Teaming Maintenance sub-module, do one of the following:
   A. Click on the Add ✚ button to add a new team.



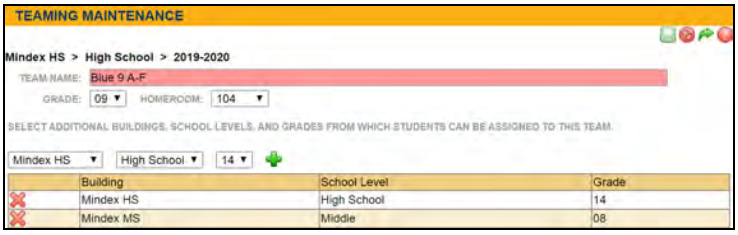
   OR:

   B. Click on the Edit button next to the team you would like to modify.



   In either case, the screen will refresh with the Team edit window.

2. Fill in or edit the appropriate fields:



   A. **Team Name:** This is a free-text field that will represent the team from this point forward. Use a name that is appropriate for your needs and is easily identifiable.
   B. **Grade:** Choose the grade that this team is valid for. You will have the ability to add multiple grades to a team in a moment.

      A student cannot be added to a team if the grade of the student is not used for this team.

   C. **Homeroom:** If a homeroom is assigned to this team, for elementary tracking purposes for instance, then choose it from this drop-down list.

      Homerooms are not typically assigned to middle and high school level teams, but if used, may result in odd scheduling results.

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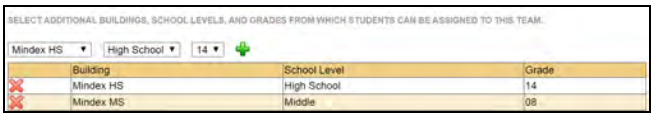
D. **Additional Buildings:** The bottom of this page is reserved for additional buildings, grade levels, and grades that should be added to this team. Simply choose the appropriate Building, School Level, and Grade from the drop-down lists and click on the green Add ✚ button to add the information.



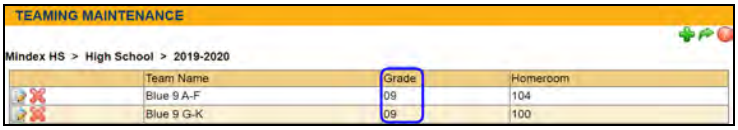
A student cannot be added to a team if the student's grade has not been added to the team.

In many cases, you will want to have multiple grades listed for any given team. Before students are advanced to new grade level (i.e., from grade 8 to 9), you may want to add them to their new teams, for instance, so a team may need both grades.

Note: A grade cannot be added to a team more than once. If you try to do so, an appropriate message will appear.

3. Click on the green Save icon in the very upper right to save this team. Your screen will refresh back to the Teams list where you will see the name of your team in read-only mode.

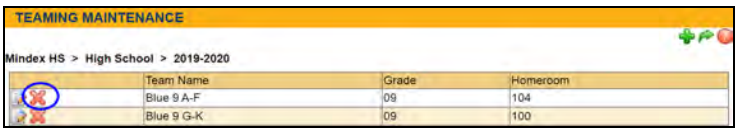
   Note: The "main" grade associated with your team will be the only grade that displays in this view. Any other grades you added will remain associated with this team, but will only be visible when you Edit the team.



Deleting Teams

Once teams have been created, or copied from a previous year, you may find that some of them are no longer necessary.

1. Within the Teams option of the Teaming Maintenance sub-module, locate the team you would like to remove and click on the red Delete ✖ button next to the desired team.



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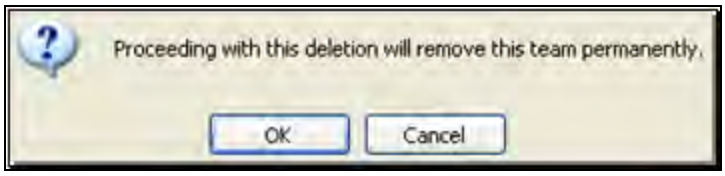
2. You will receive a message confirming the deletion.



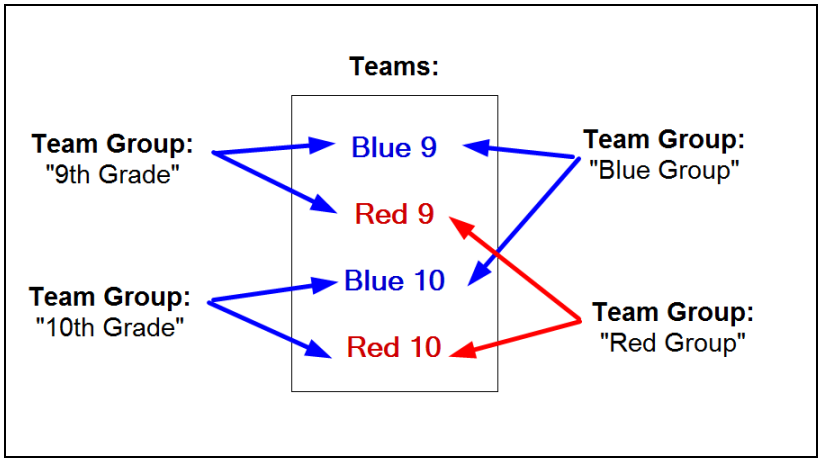
3. When prompted with a reminder that this deletion will be permanent, click **OK** (to proceed) or **Cancel**(if you do not wish to delete the team).

   Notes: A team cannot be deleted if it is being used by your Master Schedule (it might be tied to a class section) or if it has students in it. If you try to delete a team that is being used, you will be prompted by an appropriate message, and you will not be able to delete the team until all ties to it have been removed.

Team Groups

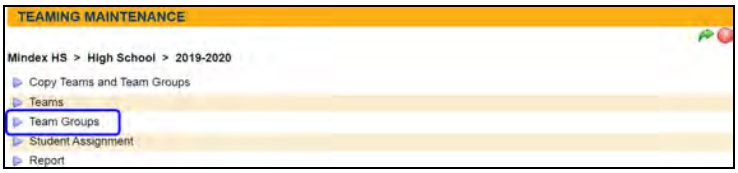
A student may only be a member of a single team at a time, but there will be times when we would like to refer to a student as if he or she were in multiple teams.

For instance, we may have a series of teams that we would like to group:

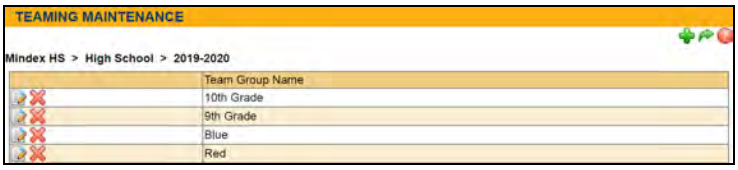


Adding and Editing Team Groups

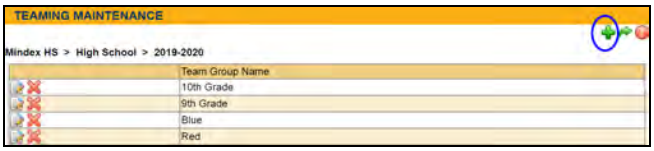
1. Click once on the Team Groups option from within the Teaming Maintenance sub-module.



2. The screen will refresh with the Team Groups window.

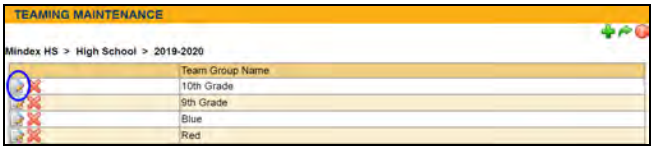


   A. Click once on the green Add button to add a new team group.



   OR

   B. Click once on the Edit button to edit an existing group.

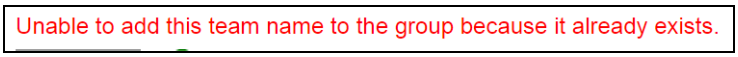


3. Fill in or edit the appropriate fields:
   A. **Team Group Name:** This is a free-text field that should contain the name of the team group. This should not be the same name as any of the existing teams, and should be something easily identifiable.
   B. **Teams:** Choose a team from the drop-down list and click on the green Add button to add the team to this group.

4. Continue selecting teams from the drop-down list, and clicking the Add button until all teams have been added to this group.

5. Groups are typically made up of two or more teams, and there is no limit to how many teams can be combined into a group.

   Note: If you attempt to add a team to this group that already exists for this group, you will receive a warning message, and the duplicate team will not be added.



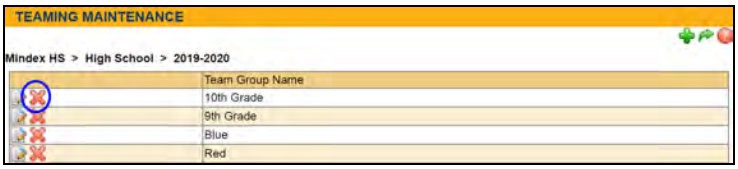
Note: You may remove any team that has been added to this group by clicking the Delete ✖ button next to the team you would like to remove.

6. Click on the green Save button to save this team group.

Deleting Team Groups

Removing a team group is as simple as removing a team.

1. Within the Team Groups option of the Teaming Maintenance sub-module, locate the group you would like to remove and click on the red Delete ✖button next to it.



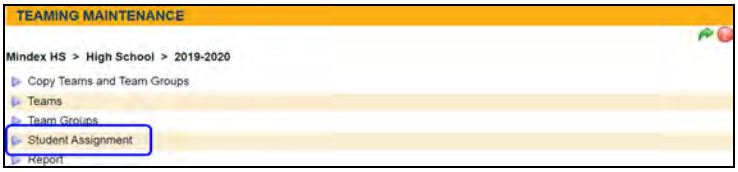
2. You will receive a message confirming the deletion.

3. When asked “Are you sure?” click **OK**to proceed or **Cancel**if you do not wish to delete the group.

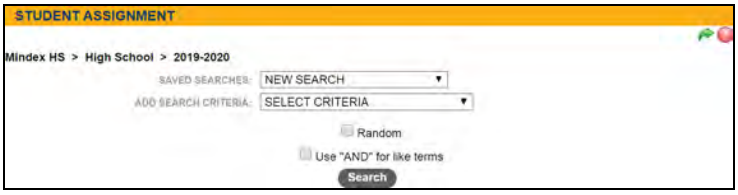
Student Assignments

Now that we have built our teams and team groups, we can populate (add students to) them. Here we will use the Batch Selector to locate a group of students, select individuals, and assign them to teams. See the Batch Selector User Guide for more information about searching for students.

1. From within the Teaming Maintenance sub-module, click once on the Select › button next to Student Assignment.



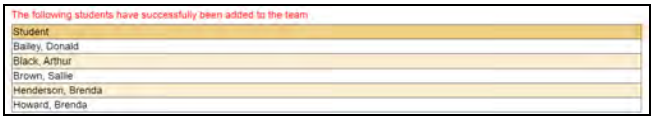
2. The screen will refresh to the Batch Selector.



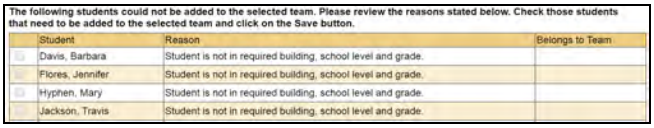
3. Use the Batch Selector to locate the group of students you would like to assign to a team and use the checkboxes to select students.
   Tip: The Batch Selector can be used with combinations of terms (like Enrollment + Team or Enrollment + Homeroom) to locate groups of students. These searches can then be saved and referred to repeatedly until all students have been placed on teams.
4. Click Continue.
5. Choose the appropriate button next to the option you would like:

A. **Add Students To:** Select a team from the drop-down list and click the Add ➕ button to put the previously selected students into that team.

   You will receive a confirmation message with a list of students that were successfully added to the team.



   Note: You may also have problems adding students to teams. In this event, a list of students, and their problems, will be presented. In the event a student is already on a team but should be on this team, you will be able to change that student's team from here by selecting the student and using the Save button to add the student to the new team.



B. **Remove Students From Current Team:** Select the Delete ✖ button to remove the students in the previously selected list from any team that they were a member of, for the currently selected year. You will be prompted with a message asking if you are sure about removing

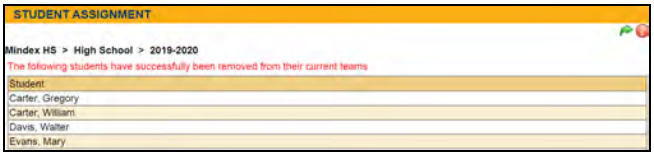
these students from their teams. Clicking **OK** will cause them to be removed from their teams.

Note: Removing students from their teams will not affect their current schedules. To move them from one team-based section to another you will need to manually edit their schedules in the Counseling module.

C. **Move Students To:** Select a team from the drop-down list and click the Edit button to move the students from their current team, to the selected team.

You will be prompted with a message asking if you are sure about moving these students to a new team. Clicking **OK** will move the students from their old team, to their new one.

A message will then be displayed with a list of the students that have been successfully moved.



D. **Auto Assign by Homeroom:** Click the Auto Assign by Homeroom button to use the student's enrollment record to determine the homeroom and to assign that student to a team that has been associated with the same homeroom.

***Note*:** This option will only appear if homeroom-based teams exist.

***Note*:** Auto Assign by Homeroom was designed to be used by elementary schools which typically utilize a supplemental (i.e., non-period based) schedule for their tracking. Contact your SchoolTool support liaison for help using this feature at the middle or high school

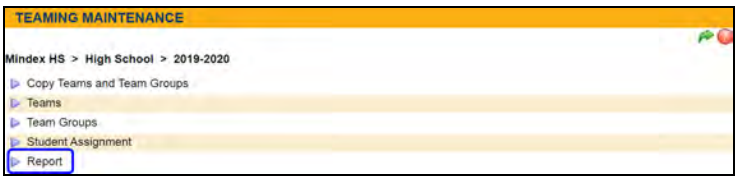
level. See the Census User Guide and *Defining and Modifying Teams* for specifics on adding homerooms to students and assigning homerooms to teams.

Team Report

The team report is a quick and effective means to determine the general makeup of our teams, including overall headcounts and gender breakdowns. We can also use this report to determine which students have not yet been assigned to a team, to make sure no one is left out.

To see this report:

1. Click on the blue Select ❯ button next to **Report**.



2. Make appropriate selections:
   A. **Team:** the specific team you would like to view, or **All** if you would like to see all teams, or **Unassigned** if you would like to see students who are not yet placed on teams.
   B. **Grade:** The grade you would like to view or choose **All** to see all grades in the selected building.
   C. **Summary Report**: Selecting the summary checkbox will print a summary report instead of the full-detail report that contains student names.

3. Click the **Run Report**button to view the report.

Listing Report

This is the report that will be produced if you do not check the Summary Report option on the pre-screen:

Teaming Listing

Mindex HS : 2019-2020 05/14/2020

Team Name	Student Name	Gender	Student ID	Grade
Blue 10				
	Bailey, Donald M	M	27154	10
	Black, Arthur E	M	24697	10
	Brown, Sallie A	F	20972	10
	Henderson, Barbara N	F	20152	10
	Henderson, Brenda M	F	20936	10
	Howard, Brenda M	F	21154	10
	Jackson, Anna C	F	21149	10
	Richardson, Nancy G	F	28772	10
	Robinson, Ralph D	M	28446	10
	Sanchez, James D	M	20795	10
	Spacely, Eric P	M	23071	10
Totals for Blue 10	**11 Students**	**5 Males, 6 Females**		
Not Assigned				
	Adams, Arthur T	M	28597	12
	Adams, Barbara E	F	19954	12
	Adams, Benjamin J	M	21020	12
	Adams, Betty M	F	20553	12

Summary Report

This is the report that will be produced if you check the "Summary Report" option on the pre-screen:

Teaming Listing

Middle School : 2006-2007 05/08/2006

Team Name	Students	Males	Females
East 7-11	32	13	19
East 7-12	30	16	14
East 7-13	33	15	18
East 7-14	32	17	15
East 7-15	29	17	12
North 7-16	31	14	17
North 7-17	35	14	21
South 7-10	29	15	14
Not Assigned	457	233	224

Scheduling Appendix

Refer to the links below for information and FAQs for Master Schedule Builder, Student Schedule Builder, and the general Student Scheduling Process.

Master Schedule Builder FAQs

- How do I verify courses which are linked to make sure sequencing is set up?
    - *Linked courses will appear in both the Course Catalog and the Master Schedule Editor (Main tab). Simply locate the Department/Course, and information indicating that a course is linked to another course will appear. To verify sequencing for those linked courses, you can then use the Sequencing report, which will list each section that has been tied to another section, helping you ensure all linked courses are setup properly.*

- Is there any way to see a list of students that requested a particular course, so you can tell which students should or shouldn't be there (maybe some made wrong selections)?
    - *Yes – use the 'Course Selection Reports per Department with Student Names' report.*
- How do I schedule a student who has lunch one semester but not the other?
    - *You have two options here.* ***Option #1*** *is to treat lunch like a course (i.e., do not invoke our lunch logic), make sections for it that are semester-based, and then use student course requests to ensure a student is automatically scheduled into only one semester of lunch.* ***Option #2*** *is to handle this scenario on a case-by-case basis, manually, by editing a student's schedule. There, you can contract a student out of a semester of lunch, or add a student to a lunch period in one semester which is already full with a core class in another.*
- How does the Master Schedule Builder affect supplemental courses?
    - *Supplementals are not touched by the builder; this is by design.*
- Does a message appear alerting users that something didn't get scheduled?
    - *No, everything gets scheduled every time. If you are trying to find students who did not receive courses that they requested, see the 'Courses Not Placed Overview' report.*
- Is there a report to list active and inactive courses for the Master Schedule build?
    - *No, but you can sort the list of courses in the Master Schedule Builder tab by clicking on the Active column heading. This will sort all active and all inactive courses together, and you can then easily scroll through the list to review.*
- What happens if only one Master Schedule Builder constraint is defined? Do all have to be defined? What is affected?
    - *If no constraints are defined, the course will not be scheduled.*
- How does SchoolTool know to create the right number of sections per semester?
    - *The Master Schedule Builder has logic to create options that match singletons, doubletons, etc., based on student requests. The system will create the best schedule which provides for the least number of conflicts.*
- Is it possible to create a block schedule using the Master Schedule Builder?

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    - *Yes. You will simply define the block meeting patterns per course when you are setting up your Master Schedule Builder Course constraints.*
- Will the Master Schedule Builder double book teachers?
    - *It depends. If you use the 'Must be Blended With' radio button option in the Master Schedule Builder Course Constraint, then SchoolTool will create sections that share the same room and teacher. However, if this option is not used, SchoolTool has logic which will prevent a teacher from being booked into more than one course section or room per period. You can still override this manually in the Master Scheduled Editor as desired.*
- If I already know all of the details of all of my sections (teachers, rooms, periods, etc) do I need to use the Master Schedule Builder?
    - *No. The Master Schedule Builder is useful when you don't know the periods or when the room number or teacher of each section doesn't matter. The Builder will create the best-fit schedule to meet the most student requests while minimizing conflicts.*

Student Schedule Builder FAQs

- Can the Student Schedule Builder be run at the same time as other users are on the system doing tasks like grading or attendance?
    - *Yes*
- Can the Student Schedule Builder be run at the same time as counselors are adding course requests?
    - *Yes*
- How is the system affected performance-wise while the Student Schedule Builder is running?
    - *The builder only takes a couple of minutes to run, and the process runs on a secondary thread, so there should be little to no impact to other users.*
- Will users get a confirmation message when the builder has finished?
    - *Yes*
- Can you lock down courses, then do lunches in the next run, then study halls after that?
    - *Yes, but you don’t need to. As part of the system, the Student Schedule Builder automatically gives students lunch unless they selected the Do Not Schedule Lunch check box when making course requests. Study halls are then done at the end of the load, as an overlay, where the student has available timeslots.*

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- If the schedule is unlocked, can manual changes be made?
    - *Yes*
- If the schedule has been locked, but you realize you have sections you don't need, can sections be removed?
    - *Yes – you can add and edit sections at any time. You can delete sections without students at any time. If you wish to delete a section with students in it, you will need to first remove the students.*
- Is it possible to run the Master Schedule Builder after you've run the Student Schedule Builder?
    - *Yes – but you must first remove students from the schedule by deleting all previous Student Schedule Builder runs.*
- How do I remove students from the schedule?
    - *Delete all run reports in the Student Schedule Builder Run History. Once these are gone, you can manipulate the Master Schedule. In addition, if any students have been manually scheduled, you may need to manually remove those placements before you are allowed to edit certain section details.*

Student Scheduling Process

Prep (Maintenance)

Activate and define School Year details

Define Semesters

Define Marking Periods

Assign Cycle Day Scheme(s)

Period Maintenance

Define Period Structure

Rollover periods from a past year

Add new periods from scratch

Confirm accuracy of period names and times

Course Catalog

Rollover School Year

Rollover selective courses

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Confirm accuracy

Course Modifications

Add new courses to be offered

Deactivate courses no longer offered

Modify any course catalog base or yearly details

Review the Course Catalog Report to verify

Student Selections

Make Selections

Selection Maintenance: Add selections for groups of students

Course Selection: Add selections for individual students

Note: These are not required if you are using the Exact radio button in the Master Schedule Builder Course Constraints for each course

Reports

Course Selection Totals per Department Report

Course Selection Reports per Department with Student Names

Individual Student Course Selection Report (Mail Home if desired)

Student without Course Selections Report

Course Selections per Student Report

Set Up Teaming (if needed)

Generally used in Elementary and Middle schools, or if a school has grades 7-12

Add students to teams

Add teams to team groups

Master Schedule

Examine/Choose Methodology

Rollover (Import) Previous Schedule and Edit appropriately

Create New Blank Schedule and add all section information

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Use SchoolTool Master Schedule Builder

Analyze Reports to Verify Student Selections

Students Without Course Selections

Course Selections versus Master Schedule

Selected Courses Not on Master Schedule

Courses With Not Enough Seats

Timeslots Requested vs. Timeslots Available

Course Selection Totals per Department

Course Selection Totals per Department with Student Names

Student Course Selection with Courses Information

Course Selections per Student

Mail Home Selections for parent signoff

If Using the Master Schedule Builder
(skip if building the master schedule
by hand)

Add Master Schedule Builder Constraints

Course

Time Frames (Meeting Patterns)

Room Type

Max Class Size

Max Sections

Schedule Active Flag

Consecutive scheduling

Dovetailing

Periods Blocked

Faculty able to teach course

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Faculty

Periods Blocked

Max Periods

Max Consecutive Periods

Favorite Room

Room

Maintenance – show facility types

Room Type Definition

Number of sections

Periods Blocked

Period

Do not schedule courses in the following periods

Union Rules

Max Periods taught

Max Periods taught in row

Run (Build Schedule)

Wait until Pie Chart completes

Analyze Reports

Section Load Report

Master Schedule

Master Schedule by Room report

Courses and Seating Capacity Reports

Course Selections versus Master Schedule

Double Book Report (Faculty and Rooms)

Active Courses by Period

Conflict Matrix

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Singleton Conflict Matrix

Student Schedule Builder

Analyze Reports to Verify Master Schedule

Section Load Report

Course Selections versus Master Schedule

- Selected Courses Not on Master Schedule
- Courses With Not Enough Seats to meet selections

(Request vs. Available) Student Over/Under Selection Report

Double Book Report

Master Schedule Report

Active Courses Per Period Report

Student Schedule Builder Options

Manually Schedule a Student

Place a student in a section or two, then builder will build around them

Add Constraints (Optional: use as appropriate)

Student/Student--Verify student A cannot be scheduled with student B

Faculty/Student--Verify student A cannot be scheduled with Faculty B

Period--Do not schedule any courses for period 6 for student A

Co-Requisite--ECO/PIG cannot be scheduled in same Semester

Sequencing--Student A scheduled for Bio Lecture Section 1 must get Lab Section 2

Class Section--Student cannot be scheduled for Sculpture and Ceramics in same year

Period to Period—Student A scheduled for section x of class 1 must get section y of class 2 (modular lunches)

Define Priorities (Optional: rank them and set active status)

Number of Non Conflicting Meeting Times (singletons, doubletons etc)

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Linked Courses

Section Balancing

Course Importance (Modify course scheduling rank, blank is last)

Elective Course Request

Seniority

Gender Balancing

Needs Balancing

Run Options

Enforce head count option

Enforce teaming option

Build teams (on the fly) option

Select group of students to schedule

Select All students

Select by Grade

Manually Select (using multi-select box)

Select using the Advanced Search (Batch Selector)

Select courses to schedule

- Exclude Lunch option
- Exclude Study Hall option
- Select All courses, Select from a Previous Run, Manually Select

Run until Schedule Data is saved

Analyze Pie Charts (Requests/Seating/Perfectly Placed students)

Analyze Placement Reports

Courses Not Placed Overview

Section Load Report

Students Missing Lunch

Student Conflict

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Credits Requested versus Credits Received

Student Placement Information

- Shows School Level Totals
- Shows individual grade totals

Students with Missing Courses Report

Student Course Selection with Course Info Report

Not Scheduled Student Course Selection Report

Student Schedules Report – Missing Course Selections format

Faculty Free Periods

Student Free Periods

Lock Schedule

Before Locking, run without Study Halls

Perform an Incremental Lock

Counselors fix students with missing courses

Run Study Hall overlay

Check Study Hall Daily Rosters and make appropriate number of sections

Perform Final Lock, if desired

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