The Education Edge™

Scheduling Guide
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The Scheduling page in **Registrar's Office** is the central location for the entire scheduling process. You can perform all tasks necessary for scheduling, including entering course requests, creating class schedules, and enrolling students. You can save different scheduling scenarios as you work on schedules. You can copy a master schedule from one year to another.

### Accessing Scheduling

To access the Scheduling page, click **Scheduling** on the navigation bar.

#### Tip:
To save time, select the default school, academic year, and session on the Scheduling page.

In the **School**, **Academic year**, and **Session** fields at the top of the page, select the school, academic year, and session to schedule. Your selections on the Scheduling page default into the screens you open from the Scheduling page, so you can save time by selecting this default information on the Scheduling page.

#### Note:
If you schedule multiple schools at once, make sure you use the same **Academic Year** table entry and **Session** table entry for each school.

You can select <All Schools> in the **School** field to schedule multiple schools at once. To schedule multiple schools, you must use the same **Academic Year** table entry and the same **Session** table entry for each school. For example, you can schedule both your middle school and high school if the academic year for each school is “2007-2008” and both years contain a “Regular” session.

If you have only one active school record or rights to only one school, the **School** field does not appear.

### Accessing Scheduling Tasks

The Scheduling page organizes scheduling tasks into categories: **Pre-scheduling tasks**, **Course Requests tasks**, **Class Scheduling tasks**, and **Student Scheduling tasks**.
Pre-scheduling Tasks

Pre-scheduling tasks are discussed in detail in the Pre-scheduling Tasks chapter.

- Click **Check academic year setup** to open the academic year selected on the Scheduling page. For more information about reviewing the academic year setup, see “Checking Academic Year Setup” on page 18.
- Click **Define core curricula** to open the Core Curricula page. You can define groups of courses to use as defaults in course request entry, for example, each grade level may have a group of required courses. For more information about defining core curricula, see “Defining Core Curricula” on page 18.
- Click **Edit scheduling options** to open your scheduling user options. For more information about editing options for scheduling, see “Editing Scheduling Options” on page 20.

Course Requests Tasks

Course requests tasks are discussed in detail in the Course Requests Tasks chapter.

- Click **Enter requests by student** to enter the courses a student requests. For more information, see “Entering Course Requests by Student” on page 25.
- Click **Enter requests by course** to enter the students requesting a course. For more information, see “Entering Course Requests by Course” on page 33.
- Click **Globally add requests** to add requests to a group of students using defined core curricula or selected courses. For more information, see “Globally Adding Course Requests” on page 37.
- Click **Globally delete requests** to delete requests, for example, if a course is cancelled due to insufficient requests. For more information, see “Globally Deleting Course Requests” on page 44.
- Click **Print course request report** to print a Course Request Report so you can evaluate course requests before creating classes. For more information, see “Reviewing the Course Request Report” on page 47.

Class Scheduling Tasks

Class Scheduling tasks are discussed in detail in the Class Scheduling Tasks chapter.

- Click **Create classes** to create class sections automatically. For more information, see “Creating Classes” on page 50.
- Click **Generate master schedule** to create a class schedule of meetings, teachers, and rooms automatically. For more information, see “Generating Master Schedules” on page 51.
- Click **Open a class** to search for a class record to open. For more information, see “Opening Classes” on page 56.
- Click **Edit master schedule** to access the Master Schedule screen. If you generated the master schedule automatically, you can edit the schedule. If you schedule manually, you can build your schedule. For more information, see “Editing Master Schedules” on page 56.
- Click **Print master schedule** to print Master Schedule Grid reports so you can review schedules in a grid format. For more information, see “Printing Master Schedules” on page 77.
- Click **Print master schedule list** to print Schedule Lists reports so you can review schedules in a list format. For more information, see “Printing Master Schedules” on page 77.

Student Scheduling Tasks

Student Scheduling tasks are discussed in detail in the Student Scheduling Tasks chapter.

- Click **Generate student schedules** to enroll students in classes automatically. For more information, see “Generating Student Schedules” on page 80.
Click **Edit student schedules** to access the Schedule a Student screen. If you generated student schedules automatically, you can edit the schedules. If you schedule manually, you can build your schedules. For more information, see “Editing Student Schedules” on page 86.

Click **Walk-in scheduler** to open the Schedule a Student screen to the Schedule View. From the Schedule View, you can manually enroll a student in courses while viewing the class schedule. For more information, see “Scheduling Walk-In Students” on page 97.

Click **Clear student schedules** to delete student enrollments in classes, for example, if you are cancelling a class in which students have already enrolled. For more information, see “Clearing Student Schedules” on page 97.

Click **Print schedules** to print Schedules reports. You can print schedules by student, room, or teacher. For more information, see “Printing Schedules” on page 100.

**Viewing Statistics**

Scheduling statistics for the selected school, academic year, and session appear at the top of the Scheduling page.

**Total number of requests.** The total number of requests for the selected school, academic year, and session appears. If all schools are selected, the number includes requests from all schools within the selected academic year and session. An Any Term request counts as one request. A partial request counts as one request.

**Total number of classes.** The total number of classes in the selected school, academic year, and session appears. If all schools are selected, the number includes classes from all schools within the selected academic year and session.

**Note:** Each student statistic also includes students from other schools taking courses at the selected school.

**Total number of students.** The total number of students that have a student progression entry for the selected school and academic year and meet the statuses to include in scheduling as set in business rules appear. This includes students with incomplete and complete schedules and students without requests.

**Students with incomplete schedules.** The total number of students with incomplete schedules appears along with a percentage. If all schools are selected, the number includes all schools with the academic year and session.

When calculating the number of students with incomplete schedules, the program starts with the total number of students and subtracts the number of students with unfulfilled requests. If you set the **Students can take a maximum of [ ] classes per term** business rule, the program also subtracts the number of students without the maximum number of requests fulfilled.

**Note:** The program considers students without requests as having complete schedules.

**Students with complete schedules.** The total number of students with complete schedules appears along with a percentage. If all schools are selected, the number includes all schools with the academic year and session.

When calculating the number of students with complete schedules, the program starts with the total number of students and then determines how many of those students have completely fulfilled requests or have the maximum requests fulfilled based on the **Students can take a maximum of [ ] classes per term** business rule.

**Unfulfilled requests.** The total number of requests without a class selected appears. A percentage also appears for the selected academic year, session, and school. If all schools are selected, the number includes all schools with the academic year and session.

**Scheduling Setup in Configuration**

This section provides an overview of the foundation of your scheduling system. For more information about setting up your scheduling system, see the *Configuration Guide for Registrar’s Office.*
**Schools.** Determine whether to use one or multiple school records. This is an important decision to make before beginning daily operations in Registrar’s Office. Adding or removing a school after entering data will be time-consuming. We strongly recommend you take the time to consider this decision before proceeding. To review considerations for setting up one or multiple school records, see the Configuration Guide for Registrar’s Office.

**Note:** You define the foundation of your scheduling system in Registrar Setup in Configuration. You only need to revisit Registrar Setup to add new scheduling information if your setup changes.

**Registrar Setup - Cycles.** Define cycles, to name the days that school meets, such as A and B days or Monday through Friday.

**Registrar Setup - Timetables.** In a timetable, you define the periods in each cycle day. You can define multiple timetables, for example, so you can associate different timetables with different sessions, academic years, and schools. You designate whether class meetings must occur within the start and end times of periods. If you do not require class meetings to occur during periods, you can still use periods, but are not limited to schedule class meetings during period times only. You also define lunch times and whether lunches occur during entire periods or parts of periods.

**Registrar Setup - Patterns.** Patterns are scheduling templates you can associate with courses to speed up the scheduling of classes. A pattern determines when classes of the course meet. Each pattern contains groups of meeting times, or “blocks”, used by scheduling to assign meeting times to classes. You can use the Pattern Wizard to quickly create blocks in the pattern based on the associated timetable and a selected pattern type, such as “Same period each day” or “Rotating”. You can also enter blocks manually.

**Registrar Setup - Scheduling Rules.** Scheduling rules define relationships courses can have when creating classes, scheduling meetings, and enrolling students. We provide one scheduling rule to help you get started: “Corequisite”. You have many options in defining scheduling rules. For example, you can define a rule to use with a Spanish IV/V class to occur on the same days with the same teacher in the same room.

**Business rules.** You set business rules, which are system-wide preferences, that affect the scheduling process. We recommend that a system administrator carefully consider and set scheduling business rules before the scheduling process begins. For example, a business rule determines the maximum number of classes students can take in a term.

### Scheduling Setup in Records

There are several areas in Records to keep in mind when preparing to schedule a new year and session. For more information about setting up records for scheduling purposes, see the Records Guide for Registrar’s Office.

**Student Progression.** Before a student is available for scheduling tasks in an academic year, the student must have a student progression entry for the academic year specifying the student’s school, grade level, advisor, homeroom teacher, and homeroom. You can enter student progression entries either manually on student records or by running a status wizard to enroll applications or mark students for re-enrollment.

In special cases, you can schedule a student in a school and grade level that is different from those specified for an academic year. For example, a middle school student can take high school courses. You can set a business rule to consider students as exceptions when in grade levels and schools that are different from those specified for the course. The program generates the exceptions when entering course requests, but you can override these exceptions when necessary.

**Room Restrictions.** On the General tab of a room record, you can verify the maximum and target room capacities.

You can allow more than one class to be scheduled in the room at the same time, such as the gym. If you allow more than one class in the room, be sure to adjust the room capacities to accommodate the multiple classes. You can require assigned homeroom teachers to stay in the room and verify the schools associated with the room if your organization has multiple schools. The restrictions on the General tab are not specific to a school, academic year, or session.
On the Restrictions tab of a room record, you can designate the days or times in which the room cannot be scheduled. Room restrictions are specific to a school, academic year, and session. If you do not define restrictions for a room, the room is always available.

To review rooms before scheduling, run the Room List Report in Reports. For more information about the Room List Report, see the Directories and Lists chapter of the Reports Guide for Registrar’s Office.

**Faculty Restrictions.** On the Restrictions 1 tab of a faculty record, you can designate that a teacher can be scheduled only in a certain room. You enter the teacher’s maximum number of classes per term, maximum number of meetings per day, and maximum number of consecutive meetings per day. If your organization has more than one school, you can associate the faculty member with the applicable schools. You can specify students that the teacher is not allowed to teach. The restrictions on the Restrictions 1 tab are not specific to a school, academic year, or session.

**Note:** You should define the time allotted for a faculty member’s lunch as a restriction. You define student lunches on timetables.

On the Restrictions 2 tab of a faculty record, you can designate the days or times in which the teacher cannot be scheduled. Faculty restrictions are specific to a school, academic year, and session. If you do not define restrictions for a faculty member, the faculty member is always available.

**Course Restrictions.** On the Restrictions 1 tab of a course record, you can set minimum, target, and maximum numbers for class sizes and number of classes per term. You can associate grade levels with the course, designate whether the course can be requested multiple times, and set a gender for the course. You can set a default alternate course and default request priority. You designate whether to include the course when generating the master schedule, including a scheduling priority, and whether to include the course when generating student schedules. The restrictions on the Restrictions 1 tab are not specific to an academic year and session.

**Note:** Course restrictions must be defined for the academic year and session for the course to be included in scheduling.

On the Restrictions 2 tab of a course record, you can define restrictions per academic year and session. You enter the length in terms and specify the start terms. You control whether to allow partial requests and whether to track class attendance.

If you restrict the course by pattern, you designate the number of meetings using pattern values or a specific value, whether to keep meetings in same room, and whether each class must use a different block. You can further restrict the course from being scheduled in certain times of a day or block.

If you restrict the course by meeting, you designate the number of meetings and the length in minutes or periods and whether to keep meetings in the same room. You can further restrict the course from being scheduled in certain cycle days or in certain periods or times of a cycle day.

**Course Resources.** On the Resources tab of a course record, you can specify what teachers and rooms can be scheduled for the course. You designate one or more teachers that can teach the class. You can enter a scheduling priority for each teacher and the target and maximum numbers of classes to teach per term. You can designate the rooms available for the course by room type or specific rooms. You can also designate if the selected teachers’ homerooms can be scheduled for classes of the course. Resource settings are not specific to an academic year and session.

**Note:** You define rules to use for courses on the Scheduling Rules page in Registrar Setup in Configuration.

**Course Rules.** On the Rules tab of a course record, you can define relationships between the course and other courses, such as corequisites and courses that must be taken in different terms. You also specify whether a rule is always followed, tried, or ignored. On the Rules tab, you can also enter prerequisites for the course. Settings on the Rules tab are not specific to an academic year and session.
**Mandatory Courses.** The program automatically generates requests for mandatory courses, for example, Chapel. The grade levels associated with a mandatory course determine the students for which the program generates requests—the program refers to the grade levels on student progression entries. When generating student schedules, the program fulfills mandatory course requests before fulfilling standard course requests. Keep in mind that you can define restrictions on mandatory course records, the same as on standard course records.

**Scheduling Checklist**

*Note:* You can save scheduling scenarios throughout the scheduling process. For more information about scheduling scenarios, see “Managing Scheduling Scenarios” on page 9.

To help you track your progress through the scheduling process for each academic year and session, you can use this scheduling checklist as a worksheet to record completion dates for each task.

<table>
<thead>
<tr>
<th>PRE-SCHEDULING TASKS</th>
<th>Date complete:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic Year Setup</strong></td>
<td></td>
</tr>
<tr>
<td>Verify the academic year record, including sessions and terms.</td>
<td></td>
</tr>
<tr>
<td>If you plan to schedule multiple schools at once, you must use the same <strong>Academic Year</strong> table entry and the same <strong>Session</strong> table entry across schools.</td>
<td></td>
</tr>
<tr>
<td>It is important to verify this information before proceeding, to avoid the task of correcting information after scheduling.</td>
<td></td>
</tr>
<tr>
<td>For more information, see “Checking Academic Year Setup” on page 18.</td>
<td></td>
</tr>
<tr>
<td><strong>Core Curricula</strong></td>
<td></td>
</tr>
<tr>
<td>Define groups of courses to use as defaults in course request entry.</td>
<td></td>
</tr>
<tr>
<td>For more information, see “Defining Core Curricula” on page 18.</td>
<td></td>
</tr>
<tr>
<td><strong>Scheduling Options</strong></td>
<td></td>
</tr>
<tr>
<td>Review your user options set for scheduling.</td>
<td></td>
</tr>
<tr>
<td>For more information, see “Editing Scheduling Options” on page 20.</td>
<td></td>
</tr>
</tbody>
</table>
**COURSE REQUESTS TASKS**

<table>
<thead>
<tr>
<th><strong>Entering Course Requests</strong></th>
<th>Date complete:</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can enter course requests by student or course. You can globally add requests to a group of students using defined core curricula or selected courses. You can also globally delete requests.</td>
<td></td>
</tr>
<tr>
<td>For more information, see:</td>
<td></td>
</tr>
<tr>
<td>“Entering Course Requests by Student” on page 25</td>
<td></td>
</tr>
<tr>
<td>“Entering Course Requests by Course” on page 33</td>
<td></td>
</tr>
<tr>
<td>“Globally Adding Course Requests” on page 37</td>
<td></td>
</tr>
<tr>
<td>“Globally Deleting Course Requests” on page 44</td>
<td></td>
</tr>
</tbody>
</table>

**Entering Requests Online**

If you have *NetClassroom*, you can have students enter their course requests online. For more information about establishing your online course request process, see the *Administration Guide for NetClassroom*.

**Reviewing Course Requests**

Review the Course Request Report to evaluate requests and make any changes before creating classes.

For more information, see “Reviewing the Course Request Report” on page 47.

**CLASS SCHEDULING TASKS**

<table>
<thead>
<tr>
<th><strong>Option 1: Create Classes, Generate Master Schedule, and Edit Master Schedule</strong></th>
<th>Date complete:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatically create class sections of courses. Generate the master schedule to schedule meetings, teachers, and rooms for the classes automatically. Edit the master schedule as needed. Print the final master schedule.</td>
<td></td>
</tr>
<tr>
<td>For more information, see:</td>
<td></td>
</tr>
<tr>
<td>“Creating Classes” on page 50</td>
<td></td>
</tr>
<tr>
<td>“Generating Master Schedules” on page 51</td>
<td></td>
</tr>
<tr>
<td>“Editing Master Schedules” on page 56</td>
<td></td>
</tr>
<tr>
<td>“Printing Master Schedules” on page 77</td>
<td></td>
</tr>
</tbody>
</table>
Option 2: Copy Scheduling Year and Edit Master Schedule
Start by copying a previously used master schedule. Edit the master schedule as needed. Print the final master schedule.

For more information, see:
“Copying Scheduling Years” on page 13
“Editing Master Schedules” on page 56
“Printing Master Schedules” on page 77

<table>
<thead>
<tr>
<th>STUDENT SCHEDULING TASKS</th>
<th>Date complete:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrolling Students in Classes</td>
<td></td>
</tr>
</tbody>
</table>
Automatically enroll students in classes. For more information, see “Generating Student Schedules” on page 80.

Enrolling Online
If you have NetClassroom, you can have students enroll in classes online. For more information about establishing your online enrollment process, see the Administration Guide for NetClassroom.

Editing and Finalizing Student Schedules
Edit student schedules as needed.

The walk-in scheduler link enables you to manually enroll a student in courses while viewing the class schedule.

You can clear schedules for specific students, for example, if a course is no longer offered due to insufficient requests.

Print schedules to give students.

For more information, see:
“Editing Student Schedules” on page 86
“Scheduling Walk-In Students” on page 97
“Clearing Student Schedules” on page 97
“Printing Schedules” on page 100

Managing Scheduling Scenarios

Consider scheduling scenarios snapshots of your scheduling process at different points in the process. For example, you can save scenarios before and after entering requests, creating classes, creating the master schedule, and enrolling students. Scenarios enable you to easily experiment with different schedules. If unsatisfied with your schedule, you can restore to a previously saved scenario to start over at a certain point in your process.
After you complete the scheduling process for an academic year and session, there is no need to store the scenarios you used during the process. We recommend you delete them. You can no longer save or restore scheduling scenarios after grades or attendance exists in classes for the academic year and session.

Saving Scheduling Scenarios

Throughout the scheduling process, you can save your current schedule information as a scenario.

- **Saving a scheduling scenario**
  1. On the Scheduling page, click **Save a scheduling scenario**. The New Scheduling Scenario screen appears.

2. In the **Scenario ID** field, enter a name for the scenario.
3. In the **Description** field, enter a description of the scenario.

**Note:** All terms in the session are saved in the scenario.

In the **Academic Year** and **Session** fields, the academic year and session of the scenario appear for informational purposes only. Other information also appears for the scenario, including original date and time added, most recent date restored and the user who restored it, and most recent date the scenario details were changed and the user who changed it.

**Note:** You must mark at least one **Save and restore** checkbox.

4. To save classes with the scenario and have the scenario’s classes overwrite existing classes when restoring the scenario, mark **Save and restore classes for this scenario**. This checkbox also applies when no classes exist. If you mark **Save and restore classes for this scenario** for a scenario without classes and you restore the scenario, the restoration removes any existing classes.

5. To save requests with the scenario and have the scenario’s requests overwrite existing requests when restoring the scenario, mark **Save and restore student requests for this scenario**. This checkbox also applies when no requests exist. If you mark **Save and restore student requests for this scenario** for a scenario without requests and you restore the scenario, the restoration removes any existing requests.
6. If you marked **Save and restore classes**, in **The following information will be present for the scenario** box, mark the checkboxes for the class information to save in the scenario, including meeting times, teacher scheduling assignments, room scheduling assignments, and student enrollment. Student enrollment includes student schedule changes saved when tracking changes.

7. In **The following schools will be included** box, mark the checkboxes for the schools to associate with the scenario. If only one school is associated with the selected academic year and session, this box does not appear and that school is automatically associated with the scenario.

![New Scheduling Scenario](image)

8. To save the scenario and return to the Scheduling page, click **Save and Close**.

**Editing Scheduling Scenarios**

You can view details of an existing scheduling scenario and edit the scenario name and description. You can remove information saved in the scenario and schools associated with the scenario, but you cannot include additional information or schools.

- **Editing a scheduling scenario**

  **Note:** To open the Scheduling Scenarios page, you can also click the Scheduling Scenarios tab on the Scheduling page.

1. On the Scheduling page, click **View, edit, or restore scheduling scenarios** to open the Scheduling Scenarios page.
2. From the list, select the scenario to view and click **Open** on the action bar. The scenario screen appears.

3. In the **Scenario ID** and **Description** fields, you can edit the name and description of the scenario.

   In the **Academic Year** and **Session** fields, the academic year and session of the scenario appear for informational purposes only. Other information also appears for the scenario, including original date and time added, most recent date restored and the user who restored it, and most recent date the scenario details were changed and the user who changed it.

4. You can unmark a **Save and restore** checkbox, but you cannot mark a new checkbox. Unmarking a checkbox removes the information from the scenario.

   For example, you can unmark **Save and restore classes for this scenario** to delete classes from the saved scenario.

5. In **The following information is present for this scenario** box, you can unmark a checkbox to delete that class information from the scenario. You cannot mark a new checkbox.

   For example, you can unmark **Room scheduling assignments** to delete rooms from the scenario.

6. In **The following schools are included** box, you can unmark a checkbox for a school to delete classes for that school from the scenario. This box appears only if multiple schools are associated with the selected academic year and session.

7. To save the scenario and return to the Scheduling Scenarios page, click **Save and Close**.

**Restoring Scheduling Scenarios**

**Note:** If classes exist in the current schedule when you select to restore, the program asks you if you want to save the current schedule as a scenario.

When you restore a scenario, the program deletes all existing scheduling information then copies in scheduling information saved in that scenario. We recommend you save your existing schedule as a scenario before restoring to a previously saved scenario.

If you restore enrollments for classes but do not restore requests, the program matches the enrollments to the current requests. If requests do not exist, the program adds the requests if you marked the **Generate request when enrolling in class without a request already present** business rule.
Be aware that when existing scheduling information is deleted when you restore a scenario, this includes any schedule changes recorded since the scenario you are restoring.

You can only restore a scenario if grades or attendance do not yet exist in classes in the school’s academic year and session and if all parts of the scenarios are available to restore.

Restoring a scheduling scenario

1. On the Scheduling page, click View, edit, or restore scheduling scenarios to open the Scheduling Scenarios page.
2. From the list, select the scenario to restore and click Restore on the action bar.
3. The scenario opens and a message appears stating that the scenario will overwrite all scheduling information for the academic year, session, and school and asking if you want to save the current scheduling information as a scenario before proceeding.
   
   To save the current information as a scenario then restore the selected scenario, click Yes.
   To restore the selected scenario without saving the current information as a scenario, click No.

Copying Scheduling Years

Note: If you copy the master schedule, you still have to enter course requests and generate student schedules for the year.

You can copy a master schedule from one academic year to another. This saves you time if your master schedule does not change much from year to year. You can make necessary changes without having to create an entirely new master schedule.

The year from which you are copying and the year to which you are copying must have the same session defined, and for each session, the same timetable and terms selected.
1. On the Scheduling page, click **Copy scheduling year**. The Copy Scheduling Year screen appears.

2. In the **Copy from academic year** field, select the academic year containing the master schedule to copy.

3. In the **Copy to academic year** field, select the academic year to which to copy the master schedule.

4. In the **Session** field, select the session to which to copy. The session must have the same timetable and terms in both years.

5. If classes already exist in the year, session, and school to which you are copying, you cannot copy. To delete existing class and schedule information before copying, mark **Delete existing classes for the academic year being copied to**.

6. In the **Copy this information for each class** box, mark checkboxes for the information to copy: **Meetings**, **Teachers**, and **Rooms**.

7. In the **Include classes associated with these schools when copying** box, mark the schools containing the classes to copy. Schools appear only if multiple schools are associated with the selected academic years and session.

8. To print a control report of what copies, mark **Print a control report on** and select a printer.

9. To review what will copy before actually copying, click **Preprocessing Report**.

10. When you are ready to copy, click **Copy Now**.
Pre-Scheduling Tasks

Checking Academic Year Setup ................................................................. 18
Defining Core Curricula ............................................................................. 18
Editing Scheduling Options ....................................................................... 20
Before entering course requests and starting the scheduling process for an academic year, you should review the academic year record for the year you are scheduling, define any core curricula you need, and check your user options set for scheduling.

On the Scheduling page, these tasks appear in the Pre-scheduling tasks list.

**Checking Academic Year Setup**

You set up academic years in **Configuration**. Before scheduling, you should review the academic year to be sure you have correctly defined the dates and sessions. Within each session, verify the correct marking columns, timetable, patterns, and calendar days are associated. Verify the terms set up in the session and the dates and first cycle day of each term. On the session’s scheduling calendar, verify the dates of the session when classes do not meet, such as holidays.

If you plan to schedule multiple schools at once, you must use the same Academic Year table entry and the same Session table entry across schools. The date ranges do not have to be the same for each school. We recommend you also use the same Term table entries, though this is not required.

Also, if scheduling multiple schools with shared resources, be sure to verify that your setup of cycle days, days in session, first cycle day of each term, and the scheduling calendar entries for each session is correct before proceeding so conflicts can be checked correctly across schools and to avoid the task of correcting this information after scheduling.

On the Scheduling page, select the school and academic year. Under Pre-scheduling tasks, click Check academic year setup. The academic year record for the academic year selected on the Scheduling page appears.

Beside the Check academic year setup link, if you have selected a specific school, either “tracking...” or “tracking off” appears indicating whether tracking is on or off for the selected school, academic year, and session. On a session record, you designate whether to track student schedule changes, including classes dropped, added, transferred, or withdrawn, and when to begin tracking this information. For example, you may not want to track changes until after you have generated student schedules and the schedules are mostly set.

If you do not have access to the session record, we recommend you establish communication with a user who can control the tracking. If multiple users are scheduling for the selected school, academic year, and session, be sure that all of these users are aware if you change this setting. Be aware that if you turn this setting on and off, the change records may not match student schedules.

For more information about defining academic years, see the Configuration Guide for Registrar’s Office.

**Defining Core Curricula**

You can set up a core curriculum to group courses. Using core curricula saves time when entering course requests. For example, create a core curriculum containing the courses all tenth graders must take.

You can add requests using core curricula either individually or globally:

- For an individual student, on the Request View of the Schedule a Student screen, click Load Core Curriculum on the action bar. For more information, see “Entering Requests by Student in the Request View” on page 25.
- For a group of students, you can globally add requests based on core curricula. For more information, see “Globally Adding Course Requests” on page 37.

A core curriculum is a default only, you can edit or delete a core curriculum without affecting any course requests you entered using the core curriculum.

In Registrar’s Office, you can also define courses in a “Mandatory” category, for example, Chapel, Homeroom, Assembly, and Advisory. Keep in mind the difference between mandatory courses and core curricula. The program automatically schedules students in mandatory courses, whereas using core curricula is helpful for grouping standard courses together and entering course requests more quickly.
Defining a core curriculum

**Note:** To open the Core Curricula page, you can also click the Core Curricula tab on the Scheduling page.

1. On the Scheduling page, click **Define core curricula**. The Core Curricula page appears.

![Core Curricula page]

2. On the action bar, click **New Core Curriculum**. The New Core Curriculum screen appears.

![New Core Curriculum screen]

3. In the **Core curriculum name** field, enter a name for the curriculum.
4. In the **School** field, select the school with which to associate the core curriculum.
5. In the **Grade level** field, select a specific grade level with which to associate the core curriculum or select "<All Grade Levels>". The selected grade level determines the students to which the core curriculum is assigned when globally adding course requests. If you select "<All Grade Levels>", globally adding course requests assigns the core curriculum to all students selected in the global add.

**Note:** To open a course record, right-click the row of the course and select **Open Course**.

6. In the **Course** column, select each course to include in the core curriculum.
The **Course Description**, **Grade Levels**, **Departments**, and **Course Types** columns appear for informational purposes only.

7. To save the core curriculum and return to the Core Curricula page, click **Save and Close**.

**Editing Scheduling Options**

We recommend you review your scheduling user options before scheduling. On the Scheduling page, click **Edit scheduling options** to open the scheduling options screen.
Prompt to save when changing views. Mark this checkbox to receive a message prompting you to save scheduling changes when switching views. If unmarked, the program automatically saves any changes when switching views.

Default grade level filter on the request view to the student’s grade level. Mark this checkbox to filter the list of possible courses in the request view by the student’s grade level.

Prompt to delete requests when deleting enrollment. Mark this checkbox to receive a message asking if you want to delete requests when you delete an enrollment. If you do not receive this prompt, requests are not deleted when you delete an enrollment.

Display cycle day using [ ]. Select to display cycle days as Display Code or Day throughout the scheduling process.

Display course using [ ]. Select to display courses by Course ID or Course Name throughout the scheduling process.

Display class using [ ]. Select to display class names using the Course ID or Course Name throughout the scheduling process.

When viewing course requests. You can select to hide certain columns in the course request grids, including requested teacher, grade level, gender, and alternates.

To set color options for the master schedule and student schedules, select the Color tab. Select Student Schedules or Master Schedule from the list on the left.

For more information about user options, see the Options chapter of the Program Basics Guide.
Course Requests Tasks

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After completing the pre-scheduling tasks, you can begin entering course requests. On the Scheduling page, links to course request tasks appear under Course Requests tasks. You can select students and enter the courses each student requests or select courses and enter the students requesting each course. You can globally add or delete course requests. You can also print a course request report to review the requests before creating classes.

Note: Course request business rules in Configuration affect checking for course rules and exceptions when adding and deleting requests. For more information about business rules, see the Configuration Guide for Registrar’s Office.

By entering course requests, you speed up your scheduling process. When creating classes, the program considers the number of course requests when determining the number of class sections to create. Using course requests permits you to enroll students in classes automatically and also helps when manually scheduling or editing schedules because you can see the list of courses each student requested.

You can enter requests for courses in the Standard course category with restriction information defined on the course record for the academic year and session. The program automatically generates requests for courses in the Mandatory course category, for example, Chapel. The grade levels associated with a mandatory course determine the students for which the program generates requests— the program refers to the grade levels on student progression entries. When generating student schedules, the program fulfills mandatory course requests before fulfilling standard course requests. Keep in mind that you can define restrictions on mandatory course records, the same as on standard course records.

When entering course requests, the program checks whether the requests exceed the maximum classes allowed per term multiplied by the maximum class size per term, as designated on the course record.

Note: Students can enter course requests online through NetClassroom.

If you have NetClassroom, you can have students enter course requests online. For more information about establishing your online course request process, see the Administration Guide for NetClassroom.

Understanding Types of Course Requests

When entering course requests, you can enter a standard course request, a partial request, or an Any Term request.

Standard Course Request. When you define course restrictions on course records, you designate the length in terms of each course and the terms in which the course can start. For example, an English course lasts for 2 terms, Fall and Spring, and must start in Fall. For this situation, you enter the course request for English in the Fall start term and the program acknowledges the request for both Fall and Spring.

Partial Request. When you define course restrictions on course records, you also designate whether to allow partial requests for the course. Allowing partial requests means that a student does not have to take all terms of a multi-term course. For example, you can set up an Art course to last for 2 terms, Fall and Spring, and start in Fall. You can enter a course request for Art as one request in the Fall start term and the program acknowledges the request for both Fall and Spring. You can edit the request to make it a partial request, for example, you can remove the Fall request but leave the Spring request.

Any Term Request. You can enter an Any Term request when a course starts in more than one term in the session and the term in which the student gets the class does not matter. Any Term requests are the equivalent of a coin toss. For example, you can enter Any Term requests for one-term elective courses.

Course Requests and Scheduling Rules

The program refers to scheduling rules when you enter course requests, if (1) you marked Use rule when enrolling students on a rule in Configuration and (2) you associated the rule with a course in Records.
Depending on the business rules you set for course requests, the program either always adds and deletes course requests automatically to meet rules or gives you a message first. For example, if you set the business rule to always add requests to meet rules and you add a request for a Chemistry course that has a corequisite rule with a Chemistry Lab course, the program also adds a request for the Chemistry Lab course. If you set the business rule to ask you first, when you add a request for Chemistry, you receive a message stating that Chemistry has a rule with Chemistry Lab and asking if you want to add a request for Chemistry Lab.

If Always is selected for a rule in the **When to Use** column on the Rules tab of the course record, you are required to fulfill the rule when entering course requests. In this case, the unfulfilled course rule is an exception you cannot override. If Try is selected for a rule in the **When to Use** column, you are not required to fulfill the rule. In this case, the unfulfilled course rule is an exception you can override. If Ignore is selected for a rule in the **When to Use** column, the rule is not considered.

For more information about defining scheduling rules, see the *Configuration Guide for Registrar’s Office*. For more information about associating rules with courses, see the *Records Guide for Registrar’s Office*.

### Entering Course Requests by Student

| Note: Be aware that multiple users can enter course requests at once. A user receives a message if another user has changed requests for the course or student for which the first user is entering requests. |

When you enter course requests by student, you select students and enter the courses each student requests. You enter the course the student requests and the first term in which the student requests the course. You can also specify the scheduling priority and requested teacher for each course. You can enter an alternate request for each main request or enter a global alternate request for the student.

You can enter course requests on either the Request View or List View of the Schedule a Student screen. We recommend using the Request View first, so you can easily add courses to the grid by selecting courses from a list or loading courses from a core curriculum. We recommend using the List View for editing requests, because you can view multiple terms on the grid at once. You can switch between views using the **View** menu on the menu bar of the Schedule a Student screen, or using the corresponding buttons on the toolbar.

| Note: The **Class** and **Alternate Class** columns do not appear in the Request View if the business rule **Reflect class schedule changes** is not marked. |

You use the Schedule a Student screen for both entering course requests and editing student schedules. At this stage, you are just entering course requests. After classes are created, you generate the master schedule and student schedules. Then when editing student schedules, you can return to the Schedule a Student screen to edit course requests and class enrollments for students as necessary. Therefore you can ignore certain areas of the Schedule a Student screen at this stage, including the **Select a Class**, **Generate Schedule**, **Clear**, and **Reset to Original** buttons on the action bar and the **Class**, **Alternate Class**, and **First Meeting** columns.

If you are currently tracking student schedule changes for the selected school, academic year, and session (as designated on the session record in *Configuration*), you can view a student’s enrollment changes by selecting **Schedule, Schedule Changes** from the menu bar. You can also add comments about changes. For more information, see “Viewing Student Schedule Changes and Adding Comments” on page 96. Keep in mind that the program records enrollment changes only, not changes in course requests.

### Entering Requests by Student in the Request View

| Note: You can set a user option to filter courses by the student’s grade level by default. |

When entering course requests in the Request View of the Schedule a Student screen, you select a student and enter the student’s requests in a grid. A course list appears on the left side of the screen. You can easily select courses from this list to move into the student’s course request grid. You can also load courses from a core curriculum into the grid.
You can delete any unfulfilled course request. A course request is fulfilled when a student is enrolled in a class of the course. To delete a course request in a request grid, select the row of the request by clicking the gray box to the left of the row, right-click, and select Delete.

From the Request View, you can run a Student Requests report by selecting File, Preview or Print. For more information about the Student Requests report, see the Request Reports chapter of the Reports Guide for Registrar’s Office.

Entering requests by student in the Request View

1. On the Scheduling page, click Enter course requests by student. The Schedule a Student screen appears, open to the Request View.

2. In the School field, select the school of the students requesting courses.

3. In the Academic year and Session fields, select the time frame for which to enter requests. You can enter requests for students with student progression entries for the selected school and academic year.

4. In the Term field, select the term or terms to appear in the request grid. The selected school, academic year, and session determine which terms are available.

Because courses in other schools may not have the same terms as the selected school, if the student has requests for courses in other schools, select “<All Terms>” to also include these requests. However, if another school has a same term as the selected school, such as Fall, requests entered for the other school also appear if you select “Fall”.

5. In the Enter for field, select a group of students. You can select all students or a query.

To create a new query, click the binoculars to access the Open Query screen, then click Add a New Query. For more information about creating queries, see the Query Guide.

6. In the Student field, enter the student. You can click the binoculars to search for the student. You can use the scroll buttons to scroll through the group of students.

The student’s nickname, if any, and grade level appear to the right of the Student field.

Note: To search for a specific course in the list, click Find. To open a course record, select the course in the list and click Open.

The course request grid for the student appears. A list of courses appears in a list on the left. You can filter the list by grade level and department.

7. In the Main Request column, you enter the student’s main course requests. There are several ways you can add main course requests to the column:
• Enter the course name manually.

**Note:** To open the course record, right-click the row and select **Open Main Request Course.**

• Click the binoculars to search for and select a course.

• Click **Add Request** on the action bar and select **Add Request** to search for and select a course.

• Drag and drop a course from the course list on the left.

• Double-click a course on the course list on the left.

• Select a course on the course list on the left and click **Select** (or right-click and select **Select as Main Request**).

• Load courses from a core curriculum. For more information, see “Loading courses from a core curriculum” on page 32.

• Rules associated with courses may also require that another request be added, for example, for corequisites. For more information about rules, see “Adding Course Rules” on page 285. A business rule set in Configuration controls whether requests are always automatically added to meet course rules or you are asked first.

8. In the **Term** column, select the start term of the request.

**Note:** You specify a course’s start term and length in terms on the course record when defining restrictions for an academic year and session. You also designate whether partial requests of the course are allowed.

• If you are entering a request for a course that lasts for more than one term, such as for an Algebra course that starts in Fall and lasts for Fall and Spring, the program acknowledges the request for both Fall and Spring.

• If more than one start term is available, such as for a one-term elective course, you can select “Any Term” or a specific term.

• To create a partial request, select the term in which to delete the request in the **Term** field above the grid. Select the row of the request, right-click, and select **Delete**. You receive a message that this course request also exists in other terms, asking if you want to remove the request in those terms as well. Click **No** to continue, resulting in a partial request.

If you do not receive a warning, the course does not allow partial requests and the request is automatically deleted for all terms.

9. In the **Course Length** column, the length of the selected course appears for informational purposes only.

10. In the **Credits** column, the number of credits of the course based on the selected term appears for informational purposes only.

11. In the **Priority** column, select “Low”, “Standard”, or “High”. The priority indicates the order in which automatic scheduling processes requests. For example, give required courses a higher priority than electives.

**Note:** If you do not need the requested teacher or alternate columns, you can turn these off in the grid. Select **Tools, Options** to control these columns.

12. In the **Requested Teacher** column, select the preferred teacher of the course. This is a priority only and the request can be fulfilled with a different teacher. To ensure a student is with a specific teacher, you must manually enroll the student in the course with the specific teacher.

13. In the **Alternate Request** column, you enter an alternate course request for each main course request. There are several ways you can add alternate course requests to the column:

**Note:** To open the course record, right-click the row and select **Open Alternate Request Course.**

• Enter a default alternate on the Restrictions 1 tab of the course record. When the course is included in course requests, the default alternate appears automatically.
- Enter the course name manually.
- Click the binoculars to search for and select a course.
- Drag and drop a course from the course list on the left.
- Select a course on the course list on the left, right-click and select Select as Alternate Request.

**Note:** You can add a global alternate for a student.

14. To enter a global alternate, enter an alternate course request in a separate row in the grid without a main request. The program considers a global alternate as an alternate request for any main request in the grid without a specific alternate request entered. To add a global alternate, you can also click Add Request on the action bar and select Add Global Alternate.

15. In the Alternate Term column, select the start term of the alternate request.

   In the Alternate Course Length column, the length of the selected course appears for informational purposes only.

   In the Alternate Credits column, the number of credits of the course based on the selected term appears for informational purposes only.

16. In the Alternate Priority column, select “Low”, “Standard”, or “High”.

17. In the Alternate Requested Teacher column, select the preferred teacher of the alternate course.

**Note:** An exception is a reason why a student request cannot be entered. For example, the student has not completed a prerequisite for the course. You designate the exceptions the program checks in Business Rules in Configuration. For more information about business rules, see the Configuration Guide for Registrar’s Office.

18. To save the requests and return to the Scheduling page, click Save and Close. If the program detects exceptions, the Request Exceptions screen appears.

![Request Exceptions](image)

**Note:** The program adds requests separately, so even if there are exceptions, the ones without exceptions are still added.

19. Each exception appears in a row. The student’s main request, term, and an explanation appears in columns. To override a main request exception, mark the checkbox for the exception in the first Override? column. Some exceptions cannot be overridden.

   You can view all exceptions for a selected request in the Main request exceptions box.

20. The student’s alternate request, term, and an explanation appear in the next columns. To override an alternate request exception, mark the checkbox for the exception in the first Override? column. Some exceptions cannot be overridden.
You can view all exceptions for a selected request in the Alternate request exceptions box.

21. You can perform functions for the whole group of exceptions.
   - To mark the Override? checkbox for all main request exceptions that can be overridden, click Override All Main Exceptions on the action bar.
   - To unmark the Override? checkbox for all main request exceptions, click Reject Main Requests on the action bar.
   - To mark the Override? checkbox for all alternate request exceptions that can be overridden, click Override All Alternate Exceptions on the action bar.
   - To unmark the Override? checkbox for all alternate request exceptions, click Reject Alternate Requests on the action bar.

22. To add requests with overridden exceptions and return to the Schedule a Student screen, click Add Requests Now.

23. To return to the Scheduling page, click Save and Close.

Entering Requests by Student in the List View

When entering course requests in the List View of the Schedule a Student screen, you select a student and enter the student’s requests in a grid. You can display multiple terms on the requests grid at once.

From the List View, you can run a Schedule Lists report by selecting File, Preview or Print. For more information about the Schedule Lists report, see the Scheduling Reports chapter of the Reports Guide for Registrar’s Office.

- Entering requests by student in the List View
  1. On the Scheduling page, click Enter course requests by student. The Schedule a Student screen appears, open to the Request View.
  2. From the menu bar, select View, List View.

   ![Schedule a Student screenshot]

   3. In the School field, select the school of the students requesting courses.

   4. In the Academic year and Session fields, select the time frame for which to enter the requests.

   You can enter requests for students with student progression entries for the selected school and academic year.
5. In the **Term** field, select the term or terms to appear in the request grid. The selected school, academic year, and session determine which terms are available.

If the student has requests for courses in other schools, these requests will not appear unless the other school has the same term as the selected school.

6. In the **Enter for** field, select a group of students. You can select all students or a query.

To create a new query, click the binoculars to access the Open Query screen, then click **Add a New Query**. For more information about creating queries, see the **Query Guide**.

7. In the **Student** field, enter the student. You can click the binoculars to search for the student. You can use the scroll buttons to scroll through the group of students.

**Note:** The student’s grade level is based on the student progression entry for the academic year.

The student’s nickname, if any, and grade level appear to the right of the **Student** field.

The course request grid for the student appears. Each selected term appears as a column with subcolumns. Enter your main and alternate requests in the applicable start terms.

**Note:** You specify a course’s start term and length in terms on the course record when defining restrictions for an academic year and session. You also designate whether partial requests of the course are allowed.

- If you are entering a standard course request, such as for an Algebra course that starts in Fall and lasts for Fall and Spring, enter the course request in the Fall start term. The program also acknowledges the request for Spring.
- If more than one start term is available for a course, such as for a one-term elective course, you can enter an Any Term request. To add an Any Term request, click **Add Request** on the action bar and select **Add Any Term Request** to select the course. The Any Term course request row spans across the entire grid.
- To create a partial request, select the term in which to delete the request in the **Term** field above the grid. Select the row of the request, right-click, and select **Delete**. You receive a message that this course request also exists in other terms, asking if you want to remove the request in those terms as well. Click **No** to continue, resulting in a partial request.

If you do not receive a warning, the course does not allow partial requests and the request is automatically deleted for all terms.

**Note:** To open the course record, right-click the row and select **Open Main Request Course**.

8. In the **Main Request** column, you enter the student’s main course requests. There are several ways you can add main course requests to the column:

- Enter the course name manually.
- Click the binoculars to search for and select a course.
- Click **Add Request** on the action bar and select **Add Request** to search for and select a course.
- Rules associated with courses may also require that another request be added, for example, for corequisites. For more information about rules, see “Adding Course Rules” on page 285. A business rule set in **Configuration** controls whether requests are always automatically added to meet course rules or you are asked first.

9. In the **Priority** column, select “Low”, “Standard”, or “High”. The priority indicates the order in which automatic scheduling processes requests. For example, give required courses a higher priority than electives.

**Note:** If you do not need the requested teacher or alternate columns, you can turn these off in the grid. Select **Tools**, **Options** to control these columns.
10. In the **Requested Teacher** column, select the preferred teacher of the course. This is a priority only and the request can be fulfilled with a different teacher. To ensure a student is with a specific teacher, you must manually enroll the student in the course with the specific teacher.

11. In the **Alternate Request** column, you enter an alternate course request for each main course request. There are several ways you can add alternate course requests to the column:

**Note:** To open the course record, right-click the row and select **Open Alternate Request Course**.

- Enter a default alternate on the Restrictions 1 tab of the course record. When the course is included in course requests, the default alternate appears automatically.
- Enter the course name manually.
- Click the binoculars to search for and select a course.

12. To enter a global alternate for a term, enter an alternate course request in a separate row in the grid without a main request. The program considers a global alternate as an alternate request for any main request in the grid without a specific alternate request entered. To add a global alternate, you can also click **Add Request** on the action bar and select **Add Global Alternate** to search for a course.

**Note:** You can add a global alternate for a student in a term.

13. In the **Alternate Priority** column, select “Low”, “Standard”, or “High”.

14. In the **Alternate Requested Teacher** column, select the preferred teacher of the alternate course. In the **Possible Credits** column, the number of credits of the course based on the selected term appears for informational purposes only.

**Note:** An exception is a reason why a student request cannot be entered. For example, the student has not completed a prerequisite for the course. You designate the exceptions the program checks in Business Rules in **Configuration**. For more information about business rules, see the **Configuration Guide for Registrar’s Office**.

15. To save the requests and return to the Scheduling page, click **Save and Close**. If the program detects exceptions, the Request Exceptions screen appears.

**Note:** The program adds requests separately, so even if there are exceptions, the ones without exceptions are still added.

16. Each exception appears in a row. The student’s main request, term, and an explanation appears in columns. To override a main request exception, mark the checkbox for the exception in the first **Override?** column. Some exceptions cannot be overridden.

You can view all exceptions for a selected request in the **Main request exceptions** box.
17. The student’s alternate request, term, and an explanation appear in the next columns. To override an alternate request exception, mark the checkbox for the exception in the first Override? column. Some exceptions cannot be overridden.

Note: If a course allows partial requests and an exception exists for one term, you cannot add any part of the request unless the exception is overridden. In this case, manually add the partial request.

You can view all exceptions for a selected request in the Alternate request exceptions box.

18. You can perform functions for the whole group of exceptions.

- To mark the Override? checkbox for all main request exceptions that can be overridden, click Override All Main Exceptions on the action bar.
- To unmark the Override? checkbox for all main request exceptions, click Reject Main Requests on the action bar.
- To mark the Override? checkbox for all alternate request exceptions that can be overridden, click Override All Alternate Exceptions on the action bar.
- To unmark the Override? checkbox for all alternate request exceptions, click Reject Alternate Requests on the action bar.

19. To add requests with overridden exceptions and return to the Schedule a Student screen, click Add Requests Now.

20. To return to the Scheduling page, click Save and Close.

Loading Core Curricula

When entering course requests by student in the Request View, you can load courses from a core curriculum into the Main Request column. For more information about core curricula, see “Defining Core Curricula” on page 18. Keep in mind you can also globally add course requests for a group of students based on a core curriculum. For more information about globally adding course requests, see “Globally Adding Course Requests” on page 37.

- Loading courses from a core curriculum

  1. On the Request View of the Schedule a Student screen, click Load Core Curriculum on the action bar. The Select a Core Curriculum screen appears.

  ![Select a Core Curriculum](image)

  2. Select a core curriculum and click Select. You return to the Request View and the courses in the core curriculum appear as the main requests in the request grid.
Entering Course Requests by Course

**Note:** Be aware that multiple users can enter course requests at once. A user receives a message if another user has changed requests for the course or student for which the first user is entering requests.

When you enter course requests by course, you select a course and then enter the students requesting the course. You enter the term, requested teacher, and priority for each student requesting the course. You can enter different alternate courses for each student.

### Entering Requests by Course

You use the Enter Requests by Course screen for both entering course requests and editing student schedules. At this stage, you are just entering course requests. After classes are created, you generate the master schedule and student schedules. Then, when editing student schedules, you can return to the Enter Requests by Course screen to edit course requests and class enrollments for students as necessary. Therefore, you can ignore certain areas of the Enter Requests By Course screen at this stage, including the **Class** and **Alternate Class** columns.

You can delete any unfulfilled course request. A course request is fulfilled when a student is enrolled in a class of the course. To delete a course request in a request grid, select the row of the student requesting the course by clicking the gray box to the left of the row, and then clicking **Delete** on the action bar. To delete all students from the grid, click **Delete All** on the action bar.

If you are currently tracking student schedule changes for the selected school, academic year, and session (as designated on the session record in **Configuration**), you can view a student’s enrollment changes by selecting the student’s row then clicking **Schedule Changes** on the action bar. You can also add comments about changes. For more information, see “Viewing Student Schedule Changes and Adding Comments” on page 96. Keep in mind that the program records enrollment changes only, not changes in course requests.

- **Entering course requests by course**

  **Note:** If you do not need the requested teacher, grade level, gender, or alternate columns, you can turn these off in the grid. Select **Tools, Options** to control these columns.

1. On the Scheduling page, click **Enter course requests by course**. The Enter Requests by Course screen appears.

   ![Enter Requests by Course Screen](image)

2. In the **School** field, select the school of the course for which to enter the requests.

3. In the **Academic year** and **Session** fields, select the time frame for which to enter the requests.
Note: In the Course field, you can click the magnifying glass to open the course record.

4. In the Main Request frame, enter information about the main course request. In the Course field, enter the course. You can click the binoculars to search for a course. You can access courses with restrictions defined for the selected academic year and session. In the Grade levels field, the grade levels of the course appear for informational purposes only.

5. In the Default term field, select the default term for the main request. This is a default only, you can change it in the request grid. You can select a start term. If more than one start term is available, you can also select “Any Term”.

6. In the Alternate Request frame, you can enter a default alternate course request to appear in the Alternate column for each student. If a default alternate is already entered on the course record of the main course request, that alternate course appears automatically. This is a default only, you can enter a different alternate request for each student in the grid. In the Course field, enter the alternate course. You can click the binoculars to search for a course. You can access courses with restrictions defined for the selected academic year and session. In the Grade levels field, the grade levels of the course appear for informational purposes only.

7. In the Default term field, select the default term for the alternate request.

Note: Any Terms requests appear in the grid only when you filter by “Any Term” or “<All Terms>”.

8. You use the Main Request Term field on the action bar to filter the main requests appearing in the request grid. If only one term is possible for the course, the Main Request Term field is locked. You can filter by start terms of the course or select “<All Terms>”. If more than one start term is available, you can filter by “Any Term”.

Note: To view a student’s record, select the student’s row and click Open on the action bar.

9. In the Student column, enter each student requesting the course. You can click the binoculars or click Load Student on the action bar to search for a student. To add a group of students to the grid at once, click Load Students. For more information about loading groups of students, see “Loading students into the requests grid by group” on page 36. Each student’s grade level and gender appear for informational purposes only. Grade levels are based on student progression entries.
10. In the **Term** column, select the start term of the request.
   - If you are entering a request for a course that lasts for more than one term, such as for an English course that starts in Fall and lasts for Fall and Spring, the program acknowledges the request for both Fall and Spring.
   - If more than one start term is available, such as for a one-term elective course, you can select “Any Term” or a specific term.

**Note:** You specify a course’s start term and length in terms on the course record when defining restrictions for an academic year and session. You also designate whether partial requests of the course are allowed.

11. In the **Requested Teacher** column, select the preferred teacher of the course. This is a priority only and the request can be fulfilled with a different teacher. To ensure a student is with a specific teacher, you must manually enroll the student in the course with the specific teacher.

12. In the **Priority** column, select “Low”, “Standard”, or “High”. The priority indicates the order in which automatic scheduling processes requests. For example, give required courses a higher priority than electives.

13. In the **Alternate** column, you can select an alternate course for each student. If you selected a course and term in the **Alternate Request** frame above the grid, this information defaults but you can change it.

14. In the **Alternate Term** column, select the term of the alternate request.

15. In the **Alternate Requested Teacher** column, select the preferred teacher of the alternate course.

16. In the **Alternate Priority** column, select “Low”, “Standard”, or “High”.

**Note:** An exception is a reason why a student request cannot be entered. For example, the student has not completed a prerequisite for the course. You designate the exceptions the program checks in Business Rules in **Configuration**. For more information about business rules, see the **Configuration Guide for Registrar’s Office**.

17. To save the requests and return to the Scheduling page, click **Save and Close**. If the program detects exceptions, the Request Exceptions screen appears.

18. Each exception appears in a row. The student’s main request, term, and an explanation appears in columns. To override a main request exception, mark the checkbox for the exception in the first **Override?** column. Some exceptions cannot be overridden.

You can view all exceptions for a selected student in the **Main request exceptions** box.
19. The student’s alternate request, term, and an explanation appear in the next columns. To override an alternate request exception, mark the checkbox for the exception in the first Override? column. Some exceptions cannot be overridden.

You can view all exceptions for a selected student in the Alternate request exceptions box.

**Note:** The program adds requests separately, so even if there are exceptions, the ones without exceptions are still added.

20. You can perform functions for the whole group of exceptions.
   - To mark the Override? checkbox for all students with main request exceptions that can be overridden, click **Override All Main Exceptions** on the action bar.
   - To unmark the Override? checkbox for all students with main request exceptions, click **Reject Main Requests** on the action bar.
   - To mark the Override? checkbox for all students with alternate request exceptions that can be overridden, click **Override All Alternate Exceptions** on the action bar.
   - To unmark the Override? checkbox for all students with alternate request exceptions, click **Reject Alternate Requests** on the action bar.

21. To add requests with overridden exceptions and return to the Enter Requests by Course screen, click **Add Requests Now**.

22. To return to the Scheduling page, click **Save and Close**.

### Loading Groups of Students

You can quickly add students into the Students column on the Enter Requests by Course screen by grade level, query, or homeroom teacher.

- **Loading students into the requests grid by group**

  1. On the Enter Requests by Course screen, click **Load Students** on the action bar. The Load Students by Group screen appears.

   ![Load Students by Group](image)

   2. In the **Add students using** field, select how the students are grouped. Select “Grade level”, “Query”, or “Homeroom teacher”.
      - If you select “Grade level”, a field appears for you to select the grade. You can select from the grade levels associated with the course of the main course request.
      - If you select “Query”, a field appears for you to select the query group.
      - If you select “Homeroom teacher”, a field appears for you to select the teacher.

  3. In the **Main Request** frame, you can select information to default into the grid. In the Term field, select the term of the request or select “Any Term”.

   ![Load Students by Group](image)
4. In the **Priority** field, select “Low”, “Standard”, or “High”. The priority indicates the order in which automatic scheduling processes requests. For example, give required courses a higher priority than electives.

5. In the **Requested teacher** field, select the preferred teacher of the course. This is a priority only and the request can be fulfilled with a different teacher. To ensure a student is with a specific teacher, manually enroll the student in the course with the specific teacher.

6. To add the students and return to the Enter Requests by Course screen, click **OK**.

### Globally Adding Course Requests

By globally adding requests, you can enter requests for a group of students using defined core curricula or a specific group of courses. For information about defining core curricula, see “Defining Core Curricula” on page 18. Restrictions must be defined on the course record in the academic year and session for a request to be added for the course. You cannot globally add partial requests.

- **Globally adding course requests based on a core curriculum**

**Note:** The student year associated with a core curriculum you add determines the students to which the requests are added. The students must also have a student progression entry for the selected school and academic year.

1. On the Scheduling page, click **Globally add requests**. The Globally Add Requests screen appears, open to the General tab.

2. In the **School** field, select the school of the courses for which to enter requests.

3. In the **Academic Year** and **Session** fields, select the time frame for which to enter the requests.

4. In the **Add using** field, select “Core Curricula”.

5. In the **Core Curriculum** column of the grid, you can select core curricula to include.
In the Grade Level column of the grid, the grade levels associated with the core curriculum appear for informational purposes only.

6. To include courses required to meet course rules for any courses included in the selected core curricula, mark Include additional courses required to fulfill Course Rules.

7. To create a query containing the students who were not assigned the course requests, mark Create exception query of students.

8. To print a control of the course requests added, mark Print a control report on and select a printer.

9. Select the Courses tab. In the Curriculum field, select the curriculum for which to display courses in the grid or select <All Core Curricula>.

The Core Curriculum, Course, and Grade Level columns appear for informational purposes only.

Note: To refresh the information in the grid based on the core curricula selected on the General tab, click Refresh from Curriculum. This is useful to restore the original selections if you make changes on the Courses tab that you want to discard without saving.

10. In the Term column, you can select the specific term of each course or select “Any Term”. If only one term is available, the cell is disabled.

11. In the Requested Teacher column, select the preferred teacher of each course. This is a priority only and the request can be fulfilled with a different teacher. To ensure a student is with a specific teacher, you must manually enroll the student in the course with the specific teacher.

12. In the Priority column, select “Low”, “Standard”, or “High”. The priority indicates the order in which automatic scheduling processes requests. For example, give required courses a higher priority than electives.

13. In the Alternate column, you can enter an alternate course if the main course request cannot be fulfilled. If a default alternate is entered on the selected course record, it automatically appears in the Alternate column.

14. In the Alternate Term column, select the term of the alternate request. If a default alternate is entered on the selected course record, that alternate’s start term appears in the Alternate Term column.
15. In the **Alternate Requested Teacher** column, select the preferred teacher of the alternate course. This is a priority only and the request can be fulfilled with a different teacher. To ensure a student is with a specific teacher, you must manually enroll the student in the course with the specific teacher.

16. In the **Alternate Priority** column, select “Low”, “Standard”, or “High” as the priority of the alternate request.

17. Select the Filters tab. On the Filters tab, you can refine your selection of students to include by name, grade level, advisor, or homeroom teacher. For more information about filtering, see the *Program Basics Guide*.

When globally adding requests using core curricula, the program uses the student years of the included core curricula to determine the students to which to add the requests. Filtering by student year does not work unless you are globally adding requests using specific courses.

18. To review the criteria, requests to be added, and existing exceptions before beginning the processing, click **Preprocessing Report**. A preprocessing report is generated.

19. If rules are associated with a selected course, the program either automatically adds any other requests necessary or asks you first, depending on your setting for the **When checking for course rules when adding requests** business rule in *Configuration*.

**Note:** The program adds requests separately, so even if there are exceptions, the ones without exceptions are still added.
20. When you are ready to begin the global add, click **Add Requests Now**. The program begins adding requests. If the program detects exceptions, the Request Exceptions screen appears.

![Request Exceptions](image)

21. Each exception appears in a row. The student’s main request, term, and an explanation appears in columns. To override a main request exception, mark the checkbox for the exception in the first **Override?** column. Some exceptions cannot be overridden.

You can view all exceptions for a selected request in the **Main request exceptions** box.

22. The student’s alternate request, term, and an explanation appear in the next columns. To override an alternate request exception, mark the checkbox for the exception in the first **Override?** column. Some exceptions cannot be overridden.

You can view all exceptions for a selected request in the **Alternate request exceptions** box.

23. You can perform functions for the whole group of exceptions.

- To mark the **Override?** checkbox for all students with main request exceptions that can be overridden, click **Override All Main Exceptions** on the action bar.
- To unmark the **Override?** checkbox for all students with main request exceptions, click **Reject Main Requests** on the action bar.
- To mark the **Override?** checkbox for all students with alternate request exceptions that can be overridden, click **Override All Alternate Exceptions** on the action bar.
- To unmark the **Override?** checkbox for all students with alternate request exceptions, click **Reject Alternate Requests** on the action bar.

**Note:** If you click **Stop**, the processing stops but any changes already made by the processing remain. To restore the course requests to how they were before you began globally adding course requests, you must have an applicable scenario to restore.

24. To add requests without exceptions and requests with overridden exceptions, click **Add Requests Now**. A processing screen appears.

![Globally Add Requests](image)

25. When processing is complete, a control report appears. If you marked **Print a control report on** on the General tab, the report prints automatically.
Globally adding course requests based on selected courses

1. On the Scheduling page, click **Globally add requests**. The Globally Add Requests screen appears, open to the General tab.

   ![Globally Add Requests](image)

   **Note:** To have the requests added, the students must have a student progression entry for the selected school and academic year.

2. In the **School** field, select the school of the courses for which to enter requests.
3. In the **Academic Year** and **Session** fields, select the time frame for which to enter the requests.
4. In the **Adding using** field, select “Specific Courses”.
5. To include courses required to meet course rules for any courses included in the selected core curricula, mark **Include additional courses required to fulfill Course Rules**.
6. To create a query containing the students who were not assigned the course requests, mark **Create exception query of students**.
7. To print a control report of the course requests added, mark **Print a control report on** and select a printer.
8. Select the Courses tab.

9. In the Course column, select the courses to include. In the Grade Level column, the grade levels associated with the course appear for informational purposes.

10. In the Term field, you can select the specific start term of the course or select “Any Term”. If only one term is available, the field is disabled.

11. In the Requested Teacher column, select the preferred teacher of the course. This is a priority only and the request can be fulfilled with a different teacher. To ensure a student is with a specific teacher, you must manually enroll the student in the course with the specific teacher.

   The teachers must be selected as resources on the course record. If a student being scheduled is marked on the teacher’s faculty record as a student that cannot be scheduled in that teacher’s classes, the student will be an exception in the global add process.

12. In the Priority column, select “Low”, “Standard”, or “High”. The priority indicates the order in which automatic scheduling processes requests. For example, give required courses a higher priority than electives.

13. In the Alternate column, you can enter an alternate course if the main course request cannot be fulfilled. If a default alternate is entered on the selected course record, it automatically appears in the Alternate column.

14. In the Alternate Term column, select the term of the alternate request. If a default alternate is entered on the selected course record, that alternate’s start term appears in the Alternate Term column.

15. In the Alternate Requested Teacher column, select the preferred teacher of the alternate course. This is a priority only and the request can be fulfilled with a different teacher. To ensure a student is with a specific teacher, you must manually enroll the student in the course with the specific teacher.

16. In the Alternate Priority column, select “Low”, “Standard”, or “High” as the priority of the alternate request.
17. Select the Filters tab. On the Filters tab, you can refine your selection of students to include by name, grade level, advisor, or homeroom teacher. For more information about filtering, see the Program Basics Guide.

18. To review the criteria, requests to be added, and existing exceptions before beginning the processing, click Preprocessing Report. A preprocessing report is generated.

19. If rules are associated with a selected course, the program either automatically adds any other requests necessary or asks you first, depending on your setting for the When checking for course rules when adding requests business rule in Configuration.

Note: The program adds requests separately, so even if there are exceptions, the ones without exceptions are still added.

20. When you are ready to begin the global add, click Add Requests Now. The program begins adding requests. If the program detects exceptions, the Request Exceptions screen appears.
21. Each exception appears in a row. The student’s main request, term, and an explanation appears in columns. To override a main request exception, mark the checkbox for the exception in the first Override? column. Some exceptions cannot be overridden.

You can view all exceptions for a selected request in the Main request exceptions box.

22. The student’s alternate request, term, and an explanation appear in the next columns. To override an alternate request exception, mark the checkbox for the exception in the first Override? column. Some exceptions cannot be overridden.

You can view all exceptions for a selected request in the Alternate request exceptions box.

23. You can perform functions for the whole group of exceptions.

- To mark the Override? checkbox for all students with main request exceptions that can be overridden, click Override All Main Exceptions on the action bar.
- To unmark the Override? checkbox for all students with main request exceptions, click Reject Main Requests on the action bar.
- To mark the Override? checkbox for all students with alternate request exceptions that can be overridden, click Override All Alternate Exceptions on the action bar.
- To unmark the Override? checkbox for all students with alternate request exceptions, click Reject Alternate Requests on the action bar.

Note: If you click Stop, the processing stops but any changes already made by the processing remain. To restore the course requests to how they were before you began globally adding course requests, you must have an applicable scenario to restore.

24. To add requests without exceptions and requests with overridden exceptions, click Add Requests Now. A processing screen appears.

25. When processing is complete, a control report appears. If you marked Print a control report on on the General tab, the report prints automatically.

### Globally Deleting Course Requests

You can delete course requests, for example, if you cancel a course due to insufficient requests. You cannot delete course requests that are fulfilled.

- **Globally deleting course requests**

Note: If more than one request exists for the request to delete, all instances are deleted. For example, you may have a course for Study Hall that can be taken multiple times.
1. On the Scheduling page, click **Globally delete requests**. The Globally Delete Requests screen appears, open to the General tab.

2. In the **School** field, select the school of the courses for which to delete requests.

3. In the **Academic Year** and **Session** fields, select the time frame for which to delete the requests.

4. In the **Delete** field, select “All Requests” or “Specific Requests”.

5. To create a query containing the students with course requests not deleted, mark **Create exception query of students**.

6. To print a control report of the course requests deleted, mark **Print a control report on** and select a printer.

**Note:** The Courses tab appears only if you are deleting specific requests.
7. If you are deleting specific requests, select the Courses tab.

8. In the **Delete Requests for these Courses** column, enter the courses for which to delete requests. This includes partial requests. You can click the binoculars to search for courses.

9. In the **Start Term** column, select the term for requests to delete or select all terms to delete requests regardless of start terms. You can also select “Any Term” if applicable.

10. Select the Filters tab. On the Filters tab, you can refine your selection of students to include by name, grade level, advisor, or homeroom teacher. For more information about filtering, see the *Program Basics Guide*.
11. To review the criteria, requests to be deleted, and existing exceptions before beginning the processing, click Preprocessing Report. A preprocessing report is generated.

12. When you are ready to begin the global delete, click Remove Requests Now.

13. When processing is complete, a control report appears. If you marked Print a control report on on the General tab, the report prints automatically.

**Reviewing the Course Request Report**

Before beginning the class scheduling process, you should review the Course Request Report to confirm the course requests entered.

For more information about the Course Request Report, see the Request Reports chapter of the Reports Guide for Registrar’s Office.

- **Reviewing a course request report**
  1. On the Scheduling page, click Print course requests report. The Select a Parameter File screen appears.

![Select a Parameter File](image)

2. Select the Course Request Report to use or click Add New to create a new report.

3. Print the report to review any changes you need to make to course records in Records or course requests in Scheduling before continuing with the scheduling process.

**Note:** You cannot delete mandatory course requests, fulfilled requests, or requests with course rules with fulfilled requests.
Class Scheduling Tasks

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After entering course requests, you can begin scheduling classes. On the Scheduling page, links to class scheduling tasks appear in the **Class Scheduling tasks** list. You can create classes and generate, edit, and print the master schedule. The master schedule is the class schedule—including meetings, rooms, and teachers.

### Creating Classes

**Note:** In the Summary View of the Master Schedule screen, you can review course limits and numbers of requests.

You can automatically create class sections of each course. The program considers existing course requests, if present, and course limits (class size and classes per term from the course record), and then creates class sections to accommodate the required capacities.

For each class section, a number is appended to the course ID. For example, if three classes are created for ALGB II, the class IDs are ALGB II - 1, ALGB II - 2, and ALGB II - 3.

#### Creating classes

1. On the Scheduling page, click **Create classes**. The Create Classes screen appears.

2. In the **Academic year** and **Session** fields, select the academic year and session you are scheduling.

3. In the **Create classes using** field, select “Target number of classes” or “Calculated number of classes”.

   To automatically use the target number of classes specified on the course record, select “Target number of classes”. If you select “Target number of classes”, proceed to step 6.

   To calculate the number of classes based on the number of requests and target class size, “Calculated number of classes”. If the calculated number of classes is out of the range specified on the course record, the next fields determine how many classes are created.

4. In the **If calculated classes is lower than minimum** field, select “Do not create classes”, “Create calculated number of classes”, “Create minimum number of classes”, or “Create target number of classes”.

   In the Summary View of the Master Schedule screen, you can review course limits and numbers of requests.
5. In the **If calculated classes is higher than maximum** field, select “Do not create classes”, “Create calculated number of classes”, “Create maximum number of classes”, or “Create target number of classes”.

6. In the **Courses without requests** field, designate how the program handles courses without requests. Select “Do not create classes”, “Create minimum number of classes”, or “Create target number of classes”.

7. To delete any classes already created for the selected courses, mark **Clear existing classes**. If classes exist that you do not clear, the program subtracts the current class number from the total number of classes needed.

   If you are tracking student schedule changes, clearing a class does not delete the record of students’ schedule changes for that class. Students enrolled in the class you are clearing are dropped from that class, which generates a new entry. However, because the class record will no longer exist, these changes are not available when you filter by class in query, export, or on the Drop/Add report.

8. If you select “Calculated number of classes” in the **Create classes using** field, you can designate whether or not to include Any Term requests in the calculations. To include Any Term requests, mark **Include any term requests in calculation**.

9. In the filters grid, you can filter the schools, courses, and start terms to include. For more information about filtering, see the **Program Basics Guide**.

10. In the **Printer** field, select a printer for your preview and control reports, and select the orientation of the report.

11. Before creating classes, click **Preview Results** to preview a report of the classes that will be created.

12. When you are ready to create classes, click **Create Now**.

13. When processing is complete, a finish screen appears. You can view the number of courses processed, the number of courses with classes created, the number of classes created, and the elapsed time. You can also print a control report from the finish screen.

### Generating Master Schedules

After creating classes, you can generate the master schedule to schedule meetings, teachers, and rooms for the classes. You can save master schedule parameter files to use later or to modify to create a master schedule with similar characteristics.

If you need to ensure certain scheduling, you can manually schedule individual classes before generating the master schedule. However, if you schedule manually, be aware that clearing schedule information using Generate Master Schedule also clears manually scheduled information. To avoid clearing manually scheduled classes of a course, unmark **Include course when generating a master schedule using a scheduling priority of [ ]** on the Restrictions 1 tab of the course record.

When generating the master schedule, the program looks for potential conflicts based on the pattern or meeting restrictions defined on the Restrictions 2 tab of course records. If you have entered course requests, the program also looks for potential conflicts based on course requests to determine how to best schedule class meetings. For example, if the same students are requesting Algebra I and English I, the program tries to not schedule classes of these two courses at the same time on the same days.

The program also considers current student enrollment when determining how to best schedule class meetings. On the Advanced tab, you can set an option to exclude a meeting time because a percentage of students requesting the course have a conflict with the time. If you have certain classes that you already know need certain students enrolled, we recommend you schedule those students in the classes before generating master schedules and set the option on the Advanced tab to exclude meeting times so the program can work around these conflicts. For example, if you have a group of students that must take Chapel in period 3, you can schedule the students in Chapel first. Then when you run Generate Master Schedule, the program does not schedule the students in other classes during period 3.
Generating a master schedule

1. On the Scheduling page, click **Generate master schedule**. The Generate Master Schedule page appears.

   ![Generate Master Schedule Page](image)

2. On the action bar, click **New Generate Master Schedule**. The New Generate Master Schedule screen appears.

   ![New Generate Master Schedule Screen](image)

   **Note:** To generate the master schedule for multiple schools at once, you can select “All Schools” in the **School** field on the Scheduling page.

3. In the **Academic year** and **Session** fields, select the academic year and session you are scheduling.

4. In the **Terms** field, select the terms to schedule. You can select “<All terms>” or “<Selected terms>”. If you choose “<Selected terms>”, mark the terms to include in the box to the right.

5. To save the current schedule as a scenario before beginning the processing, mark **Before processing, save a copy of the current scheduling scenario**.
   
   We recommend you mark this so you can return to the scenario if you do not want to keep the processing changes.

6. To save the resulting schedule as a scenario after the processing is complete, mark **After processing, save a copy of the resulting scenario**.
   
   We recommend you mark this so you can experiment with the master schedule but return to the original results from processing if necessary.

   **Note:** You select schedule information on the General 2 tab.
7. To create a query to use to troubleshoot incomplete classes, mark **Create an output query of classes missing selected scheduling information**.

8. To print a control report of the processing, mark **Print a control report** on and select a printer.

9. Select the General 2 tab.

![Image of scheduling interface](image)

**Note:** If classes included in the processing already have meetings, teachers, or rooms scheduled, that information cannot be changed or removed unless you mark **Clear**.

10. In the **Scheduling Information** grid, mark the checkboxes to designate whether to schedule, clear, or both schedule and clear specific scheduling information, including meetings, teachers, and rooms.
11. If you are scheduling rooms, you can mark **Keep teachers in homeroom if the room is a resource for the course.** This limits teachers to their homerooms when scheduling them in classes, if the teacher selected for the course has a homeroom and the room is a resource for the course.

12. If you are scheduling meetings, you can mark **Schedule class meetings only if a [] can be scheduled** and select a definition of what to consider a useful schedule in processing. You can designate that classes not be scheduled unless a room, teacher, room or teacher, or both room and teacher can be scheduled. This guarantees that not just meeting times are scheduled.

13. Select the Advanced tab.

14. In the **Restrictions to Override** grid, you can select restrictions for the processing to ignore. This box refers to restrictions set on faculty/staff, room, and course records. You would typically do this in subsequent runs to try to get a more complete schedule.

![New Generate Master Schedule](image)

Note: In the **Course Rules** grid, you can override the priority of existing course rules on course records, you do not add rules to course records.

15. In the course rules grid, you can select to override the priority of an existing course rule on all course records. In the **Course Rules** column, select the rule. In the **Override When to Use** column, select the priority to use: “Always”, “Try”, or “Ignore”.

16. To exclude a meeting time because a significant portion of students requesting the course are already scheduled in another course, mark **Exclude meetings where at least [ ] percent of students requesting the course have a conflict.** Then enter the percentage of students to consider as the significant portion. For example, if 40 students request Latin and you set the percentage of students to 25%, if 10 of those students have another class in Period 1 on Monday, Latin cannot be scheduled in that meeting time.

17. In the **When sorting courses use this priority order** box, mark the checkboxes for each priority to use when scheduling courses, then use the up and down arrows to order the priorities in the list. To achieve the best results, the program schedules one class of a course at a time, moves to the next course in priority order, and then starts over again.
18. Select the Filters tab.

19. In the filters grid, you can refine your selection of classes to include in the processing, such as by courses and faculty. For more information about filtering, see the Program Basics Guide.

20. To filter out courses without requests, unmark Include courses with no requests.

21. To include additional classes if a course has a rule requiring an additional class to be created, mark Include additional classes required to fulfill Course Rules.

22. On the toolbar, click Save to save your parameters.

**Note:** If filtering by school, make sure you include the correct schools defined for the academic year being scheduled.

23. To generate the master schedule, click Schedule Now. A processing screen appears.

**Note:** If you click Stop, the processing stops but any changes already made by the processing remain. To restore the schedules to how they were before you began generating the master schedule, you must have an applicable scenario to restore.

24. When processing is complete, a finish screen appears. You can view the number of courses processed, number of classes scheduled, number of classes with missing information, and the elapsed time. You can also print a control report from the finish screen.
Opening Classes

By clicking the **Open a class** link on the Scheduling page, you can search for and select a specific class record to open. Keep in mind that you can also open class records from the Master Schedule screen or from the Classes tab of a course record. For more information about class records, see “Managing Classes and Meetings” on page 60.

Editing Master Schedules

**Note:** As you are working on the master schedule, you can easily save a copy of your current schedule as a scheduling scenario by selecting **Schedule, Save a scheduling scenario** from the menu bar.

After generating the master schedule, you can edit the schedule as needed on the Master Schedule screen. You can add, edit, and delete classes. If you did not use Generate Master Schedule, you can build your master schedule on the Master Schedule screen.

To work within a smaller group of records at a time, you can filter any master schedule screen by courses, course grade levels, course departments, faculty, faculty departments, or rooms. From the master schedule screen, select **Schedule, Filters** from the toolbar. For more information about filtering, see the *Program Basics Guide*.

There are three views to the master schedule to help you in editing: Summary, List, and Grid. In the Summary View, you can edit total classes, classes per term, and class sizes. From this view, you can also update these numbers on course records. In the List View, you can view classes by time, period, or block, and add or edit classes. In the Grid View, you can view the schedule in a grid format. From this view, you can add or edit classes, and even drag and drop classes in the grid. You can switch between views using the **View** menu on the menu bar of the Master Schedule screen, or using buttons on the toolbar.

When editing master schedules, keep in mind how the **Reflect class schedule changes** business rule affects the master schedule. If this business rule is marked, changing the meeting, teacher, or room of a class also updates the class in other terms. You may want to set the business rule to reflect “in all terms” when you are first editing the schedule for the year, and then for editing during the year, either change the setting to “in subsequent terms” or unmark the business rule so changes are not reflected at all in other terms.

You can set user options for the colors that student, teacher, and room conflicts appear on master schedules. Select **Tools, Options** from the menu bar. On the Options screen, select the Color tab and select **Master Schedule** from the list on the left.

Editing Master Schedules in the Summary View

In the Summary View, you can view and edit the number of classes per term, the minimum, maximum, and target number of classes per term, and the class sizes. You can view the number of requests per term.

You can access the Create Classes utility from the Summary View if necessary by clicking **Create Classes** on the action bar. For more information about creating classes, see “Creating classes” on page 50.

- **Editing a master schedule in Summary View**
  1. On the Scheduling page, select the school, academic year, and session of the master schedule to edit.

    **Note:** Changing the school, academic year, and session selections on the master schedule screen may take time to refresh.

  2. Click **Edit master schedule**. The Master Schedule screen appears.
3. From the menu bar, select **View, Summary View**.

![Image of Master Schedule interface](image)

4. In the **School** field, you can change the school to edit. In the **Academic year** and **Session** fields, you can change the time frame to edit.

5. In the **Term** field, select a specific term or “<All Terms>”.

**Note:** To search for a specific course in the summary, click **Find** on the action bar.

Schedule information appears in the grid based on your selections. The courses appear in the **Course ID** or **Course Name** column. The name of the column depends on the user option set for how courses appear.

The grade levels of the courses appear in the **Grade** column.

**Note:** If the number of total classes is less than the minimum number of classes entered for the course, the course appears in red.

6. In the **Total Classes** column, a subcolumn for each selected term appears, containing the total number of existing classes. When in the subcolumn for the start term for the course, you can edit the number of total classes to add or delete classes.

7. In the **Classes Per Term** column, subcolumns appear displaying the minimum, target, and maximum values from course records. You can edit these subcolumns.

8. In the **Class Size** column, subcolumns appear for displaying minimum, target, and maximum values. You can edit these subcolumns.

In the **Total Requests** column, subcolumns appear for each selected term for informational purposes only. If you are displaying all terms, an **Any Term** column also appears. These columns display the total number of requests in the term, regardless of the request’s start term.

In the **Requests Start Term** column, subcolumns appear for each selected term for informational purposes only. If you are displaying all terms, an **Any Term** column also appears. These columns display the total number of requests in each start term.

**Note:** You can clear all classes from this screen if necessary, resetting each class number to zero by clicking **Clear All Classes** on the action bar.

9. As you are editing the classes per term and class size values in the grid, you can return the grid to the original values on the course records or update the course records with the grid values.
To reset the classes per term and class size values in the grid to the values on the course records, click **Restore All Course Values** on the action bar.

To update course records with the classes per term and class size values in the grid, click **Update All Course Records** on the action bar.

You can also open a course record from the grid. To open a course record, select the row, right-click, and select **Go to Course**.

10. The program automatically saves your changes to the master schedule. To close the Master Schedule screen, select **File, Close** from the menu bar.

**Editing Master Schedules in the List View**

You can edit a master schedule in a list format, and view classes by time, period, or block. You can add and edit class records in the List View.

You can access the Generate Master Schedule utility from the List View if necessary. Click **Generate Master Schedule** on the action bar. For more information about generating a master schedule, see “Generating a master schedule” on page 52.

You can also access the Create Classes utility from the List View if necessary. Select **Schedule, Create Classes** from the menu bar. For more information about creating classes, see “Creating classes” on page 50.

- **Editing a master schedule in List View**

  1. On the Scheduling page, select the school, academic year, and session of the master schedule to edit.

  **Note:** Changing the school, academic year, and session selections on the master schedule screen may take time to refresh.

  2. Click **Edit master schedule**. The Master Schedule screen appears.

  3. From the menu bar, select **View, List View**.

  ![Master Schedule Screen](image)

  4. In the **School** field, you can change the school to edit. In the **Academic year** and **Session** fields, you can change the time frame to edit.

  5. In the **Term** field, select a specific term or “<All Terms>”.

  6. In the **Show by** field, select “Time”, “Period”, or “Block”.


7. In the **Meetings** field, select “All Meetings” or “First Meetings Only”.

8. In the **View** field on the action bar, you can select to view all classes or classes without teachers, rooms, or meetings.

**Note:** “Period” is available if class meetings are required to occur only in periods.

9. Other fields appear on the action bar depending on your selection in the **Show by** field. If you selected “Time”, you can filter by cycle day, start time, and end time. If you selected “Period”, you can filter by cycle day and period. If you selected “Block”, you can filter by pattern and block.

**Note:** You can change class section numbers.

10. To open a class to edit, select the class and click **Open** on the action bar.

11. To add a new class, click **Add Class** on the action bar. The New Class screen appears. For more information about adding a class, see “Adding a new class” on page 61.

12. The program automatically saves your changes to the master schedule. To close the Master Schedule screen, select **File, Close** from the menu bar.

### Editing Master Schedules in the Grid View

You can edit a master schedule in a grid format. If you used patterns to create classes, you can automatically regenerate meetings when you edit classes.

In the Grid View, you can open individual classes to add or update the meetings, teachers, or rooms scheduled. You can also add or update meetings, teachers, or rooms by dragging and dropping the class into another cell.

**Note:** A teacher with multiple classes at the same time on the same days always appears as a conflict, even if you allow this scenario with a scheduling rule.

To show conflicts on the grid, you can right-click the grid and select **Show Faculty Conflicts**, **Show Room Conflicts**, or **Show Student Conflicts**. On the grid, “T” indicates teacher conflicts, “R” indicates room conflicts, and “S” indicates student conflicts. To specify the color to appear for each type of conflict, select **Tools, Options** from the menu bar, select the Color tab, and select Master Schedule from the list on the left.

You can access the Create Classes utility from the Grid View if necessary. Click **Create Classes** on the action bar. For more information about creating classes, see “Creating classes” on page 50.

You can also access the Generate Master Schedule utility from the Grid View if necessary. Click **Generate Master Schedule** on the action bar. For more information about generating a master schedule, see “Generating a master schedule” on page 52.

- **Editing a master schedule in Grid View**
  1. On the Scheduling page, select the school, academic year, and session of the master schedule to edit.

**Note:** Changing the school, academic year, and session selections on the master schedule screen may take time to refresh.

  2. Click **Edit master schedule**. The Master Schedule screen appears.
3. From the menu bar, select View, Grid View.

![Master Schedule](image)

**Note:** To quickly create a spreadsheet of the master schedule to distribute to others, right-click the grid and select Export Master Schedule to Excel.

4. In the School field, you can change the school to edit. In the Academic year and Session fields, you can change the time frame to edit.

5. In the Term field, select a specific term or “<All Terms>”.

6. In the Show by field, select “Time”, “Period”, or “Block”. If you select “Time”, additional fields appear on the action bar so you can filter by interval, start time, and end time.

7. In the Meetings field, select “All Meetings”, “First Meetings Only”, or “Scheduled Meetings”. This determines the columns that appear in the grid.

**Note:** You can right-click the row to select to open the course, faculty, or room record.

8. In the Display By field, select “Course”, “Faculty”, or “Room”. This determines the rows that appear in the grid.

You can also filter the course, faculty, or room records appearing on the grid by selecting Schedule, Filters from the menu bar. For example, you may want to work with senior-level courses first and filter by course department.

To open a course, faculty, or room record from the grid, depending on your selection in the Display By field, right-click the row and select Go to Course, Go to Faculty, or Go to Room.

9. To open a class to edit, select the class and click Open on the action bar.

10. To add a new class, click Add Class on the action bar. The New Class screen appears. For more information about adding a class, see “Adding a new class” on page 61.

11. The program automatically saves your changes to the master schedule. To close the Master Schedule screen, select File, Close from the menu bar.

### Managing Classes and Meetings

**Note:** You can also access classes using the Open a class link on the Scheduling page.
You can add new classes and edit existing classes when editing the master schedule in the List or Grid View. When adding a new class, you enter the section number, add the class meetings, attach attributes, and add notes. Although you can also enroll students in classes on the class record, we recommend you enroll students manually at this stage only for special cases. Using the Generate Student Schedules utility, you can enroll students in classes automatically. After you enroll students in classes, you can drop, withdraw, and transfer students from the class record.

Keep in mind that scheduling business rules affect how classes and meetings are added:

- Restrictions are defined on faculty records for how many classes a teacher can be assigned per day, and a maximum number of consecutive classes per day. In business rules, you define the maximum amount of time between consecutive meetings.
- When creating a new class for a course restricted by a pattern, whether meetings are always created automatically or you are first asked if you want to create the meetings automatically is controlled by a business rule.
- Another business rule controls what happens when a room or teacher is added to a meeting—whether the change is always reflected in other meetings, you are first asked whether you want the change reflected in other meetings, or the change is never reflected in other meetings.
- If changes to a class’s meeting, teacher, or room should also update the class in other terms, you can mark a business rule **Reflect class schedule changes** and select to reflect the changes in all terms or subsequent terms only.

### Adding a new class

1. From the List View or Grid View of the Master Schedule screen, click **Add Class** on the action bar. The New Class screen appears.

   If you were focused on an existing class in the Grid View when you clicked **Add Class**, the new class record that appears is for the next section of that class. If the course is restricted by pattern, a message asks if you want to automatically create meetings for the class.

2. In the **Course ID** field, select the course of the class to create. You can click the binoculars to search for the course.

   In the **Course name** field, the name of the selected course appears for informational purposes only.

3. In the **Start term** field, select the class’s start term.

   **Note:** Each class ID appears in the format “Course ID - Section”.

**Note:** The target class size and room capacity appear in the status bar. If more than one room is scheduled, the lowest room capacity appears.
4. In the **Section** field, enter the section number of the course. The value defaults to the lowest section number available for the course.

   The school, academic year, session, course grade levels, and course category appear for informational purposes only.

5. Select the Meetings tab. You can view the Meetings tab in a List View and in a Grid View. The tab opens to the Grid View.

![Meeting grid view](image)

6. In the **Term** field, select the term to appear in the grid.

   **Note:** “Period” is available if class meetings are set to occur only in periods.

7. On the action bar, in the **Show** field, select “Time” or “Period” to control how the meeting columns appear. If you select “Time”, additional fields appear so you can filter the grid by interval, start time, and end time.

   If a course is restricted by pattern, the block letter appears in a cell in which the course can be scheduled. If a lunch exists, it appears beside the block.

8. To show the times the course is restricted from being scheduled in the grid, select **Class**, **Show Course Restrictions** from the menu bar. “C:Restricted” appears in the cells in which the course cannot be scheduled.

9. To add a new meeting, click **New Meeting** on the action bar. For more information about adding meetings, see “Adding a new meeting to a class” on page 70.

10. To search for available teachers and rooms, select **Class**, **Find Free** from the menu bar. For more information, see “Finding free teachers and rooms” on page 76.

11. When scheduled, the teacher name appears in a cell. To add a teacher, right-click and select **Add a Teacher**.

12. When scheduled, the room name appears in a cell. To change the room, right-click and select **Update Room**.

13. To delete a meeting from the grid, select the meeting and click **Delete** on the action bar.

14. To delete all meetings in the selected term, click **Delete All** on the action bar.

15. In the **Display availability for** field, you can select from teachers designated as resources for the course. In the grid, T:<em>with the Class ID</em> appears in cells that the teacher cannot be scheduled in due to restrictions or another class.

   In the next field, you can select from specific rooms designated as resources for the course. In the grid, R:<em>with the Class ID</em> appears in cells that the teacher cannot be scheduled in due to restrictions or another class.
These fields are useful when you want to move a class, for example, if a class has no students enrolled because all students requesting the class have a conflict with it. By displaying availability for teachers and rooms, you can see where you can move the class.

16. From the menu bar, select **View, List View**. The List View provides another way to add and edit the class meetings.

17. To add a new meeting, click **New Meeting** on the action bar. For more information about adding meetings, see “Adding a new meeting to a class” on page 70.

18. To edit an existing meeting, select the row of the meeting and click **Open** on the action bar.

   The **Conflicts** column displays any teacher or rooms conflicts.

**Note:** You can filter the Schedules and Schedule Lists reports by class attributes.
19. Select the Attributes tab.

20. In the Attribute type field, you can filter the attributes appearing in the grid.

21. In the Attribute Type column, select an attribute.

22. In the Description column, enter the description for the attribute.

   If you selected a table type attribute that uses short descriptions, in the Short Description column, select the attribute description. The Description column completes automatically.

23. In the Date column, enter the date you add the attribute or another date relevant to the attribute.

24. If you mark the checkbox in the Required column, the attribute is required and you must add it before you can save the record.

25. In the Comments column, you can enter any additional comments about this attribute.

   **Note:** You can include class notes on report cards. For example, you may want to provide detail about what students worked on in the class during that marking column.

26. Select the Notes tab.
27. To add a new note, click **New Note**. The New Note screen appears.

28. In the **Marking column** field, select the marking column to associate with the note. You can define only one note per marking column and class.

29. In the text box, enter the note.

30. To save the note and return to the Notes tab, click **Save and Close**.

31. To save the class record and return to the Master Schedule screen, click **Save and Close**.

- **Editing a class**

  **Note:** You can also open a class using the **Open a class** link on the Scheduling page.

  1. From the List View or Grid View of the Master Schedule screen, select a class and click **Open** on the action bar to open the class record.
2. On the Class tab, you can edit the section number of the class.
3. In the Information Scheduled grid, you can view information about the class already scheduled in terms. A row appears for each term.
   • In the Students Enrolled column, the number of enrolled students appears.
   • In the Seats Available column, the number of available seats appear based on target class size number.
   • In the Meetings Present column, the number of meetings present out of the number of meetings specified on the course record appears.
   • In the Meetings without Resources column, the number of meetings without resources appears. “T” appears beside the number of meetings without a teacher. “R” appears beside the number of meetings without a room.

4. Select the Meetings tab. You can view the Meetings tab in a List View and in a Grid View. The tab opens to the Grid View.

5. To add a new meeting, click New Meeting on the action bar. For more information about adding meetings, see “Adding a new meeting to a class” on page 70.
6. To edit an existing meeting, select the row of the meeting and click Open on the action bar.
7. In the Term field, select the term to appear in the grid.

**Note:** “Period” is available if class meetings are set to occur only in periods.

8. On the action bar, in the Show field, select “Time” or “Period” to control how the meeting columns appear. If you select “Time”, additional fields appear so you can filter the grid by interval, start time, and end time.

If a course is restricted by pattern, the block letter appears in a cell in which the course can be scheduled. If a lunch exists, it appears beside the block.
9. To show the times the course is restricted from being scheduled in the grid, select **Class**, **Show Course Restrictions** from the menu bar. “C:Restricted” appears in the cells in which the course cannot be scheduled.

10. To search for available teachers and rooms, select **Class**, **Find Free** from the menu bar. For more information, see “Finding free teachers and rooms” on page 76.

11. When scheduled, the teacher name appears in a cell. To add a teacher, right-click and select **Add a Teacher**.

12. When scheduled, the room name appears in a cell. To change the room, right-click and select **Update Room**.

13. To delete a meeting from the grid, select the meeting and click **Delete** on the action bar.

14. To delete all meetings in the selected term, click **Delete All** on the action bar.

15. In the **Display availability for** field, you can select from teachers designated as resources for the course. In the grid, T:<em>with the Class ID</em> appears in cells that the teacher cannot be scheduled in due to restrictions or another class.

In the next field, you can select from specific rooms designated as resources for the course. In the grid, R:<em>with the Class ID</em> appears in cells that the teacher cannot be scheduled in due to restrictions or another class.

These fields are useful when you want to move a class, for example, if a class has no students enrolled because all students requesting the class have a conflict with it. By displaying availability for teachers and rooms, you can see where you can move the class.

**Note:** To view a student’s record, right-click the row and select **Go To Student**.

16. Select the **Students** tab.

Note: To create a class roster, show enrolled students and right-click to export the grid. You can also use the Class Report in **Reports**.

17. In the **Term** field, select a specific term to show in the grid or select “<All Terms>”.

18. Students with requests for the course automatically appear in the grid. In the **Show** field on the action bar, you can filter the students appearing in the grid. You can select “<All Students>” to show all students requesting the course, or you can select “Enrolled”, “Unfulfilled”, or “Withdrawn”.

**Note:** You can set a user option to delete the course request as well when deleting an enrollment.

19. To enroll a student in the class, mark the checkbox in the **Enrolled?** column.
To unenroll a student, unmark the checkbox in the Enrolled? column. If there is no withdrawal date, this drops the student. If there is a withdrawal date, a message appears asking whether you want to drop or withdraw the student. For more information about dropping a student, see “Dropping a student from a class” on page 72. For more information about withdrawing a student, see “Withdrawing a student from a class” on page 73.

If you are currently tracking student schedule changes, changes to a student’s enrollment are recorded. For more information about student schedule changes, see “Viewing Student Schedule Changes and Adding Comments” on page 96.

The Term, Grade Level, Request Priority, Requested Teacher, and Status columns appear for informational purposes only. The Status column displays information if a student is enrolled in a different section of the course, has a conflict with one of the class meetings, withdrew from the class, or is enrolled in the course’s alternate.

**Note:** You can set a business rule to generate a course request when enrolling in a class without a request already present.

20. If you need to add students to the class who have not requested the course, there are several ways to add students to the grid.
   - In the Student Name column, enter a student’s name or click the binoculars to search for a student.
   - To search for one student to add, click Add Student on the action bar.
   - To add a group of students to the grid at once, click Load Students. For more information about loading groups of students, see “Loading students into the requests grid by group” on page 36.

21. To view a student’s schedule, select the student and click View Schedule on the action bar.

22. If you are currently tracking student schedule changes for the selected school, academic year, and session (as designated on the session record in Configuration), you can view changes to a student’s schedule by selecting the student then clicking Schedule Changes on the action bar. You can also add comments about changes. For more information, see “Viewing Student Schedule Changes and Adding Comments” on page 96.

**Note:** Press CTRL to select more than one student to transfer.

23. To transfer a student, select the student and click Transfer on the action bar. For more information about transferring a student, see “Transferring a student to a different class section” on page 71.

If you are currently tracking student schedule changes, transfer activity is recorded. For more information about student schedule changes, see “Viewing Student Schedule Changes and Adding Comments” on page 96.

24. To edit grades for a withdrawn student, select the student and click Edit Withdrawn Grades on the action bar.

If you are currently tracking student schedule changes, withdrawal activity is recorded. For more information about student schedule changes, see “Viewing Student Schedule Changes and Adding Comments” on page 96.
25. **Select the Attributes tab.**

26. In the **Attribute type** field, you can filter the attributes appearing in the grid.

27. In the **Attribute Type** column, select an attribute.

28. In the **Description** column, enter the description for the attribute.
   
   If you selected a table type attribute that uses short descriptions, in the **Short Description** column, select the attribute description. The **Description** column completes automatically.

29. In the **Date** column, enter the date you add the attribute or another date relevant to the attribute.

30. If you mark the checkbox in the **Required** column, the attribute is required and you must add it before you can save the record.

31. In the **Comments** column, you can enter any additional comments about this attribute.

**Note:** You can include class notes on report cards. For example, you may want to provide detail about what students worked on in the class during that marking column.

32. **Select the Notes tab.**
33. To add a new note, click **New Note**. The New Note screen appears.

34. In the **Marking column** field, select the marking column to associate with the note. You can define only one note per marking column and class.

35. In the text box, enter the note.
36. To save the note and return to the Notes tab, click **Save and Close**.
37. To save the class record and return to the Master Schedule screen, click **Save and Close**.

### Adding a new meeting to a class

**Note:** When adding new meetings of classes restricted by pattern, messages appear if you select to schedule a meeting in a restricted block or a block used by another class (if you marked **Each class must use a different block** on the pattern). You can override both of these exceptions.

1. On the Meetings tab of a class record, click **New Meeting** on the action bar.
Note: Values appear by default if you add a meeting from the Grid View with focus in a cell.

2. In the **Cycle day** field, select the cycle day of the meeting.
3. If class meetings are required to occur during periods, enter the start period and number of periods.
4. If class meetings are not required to occur during periods, enter the start time and end time.
5. If the course is restricted by a pattern and the meeting falls in a block, the block appears in a **Block** field for informational purposes only.
6. In the **Room** field, select a room for the meeting.
7. In the **Lunch** field, select a lunch if times of the meeting span times when a lunch exists.
8. In the **Teacher(s)** grid, select the class teacher or teachers.
9. To add the meeting and return to the Meetings tab of the class record, click **OK**.

### Transferring a student to a different class section

**Note:** You can also open a class using the **Open a class** link on the Scheduling page.

1. From the List View or Grid View of the Master Schedule screen, select the class and click **Open** on the action bar. The class record appears.

**Note:** You can also transfer students from the Schedule a Student or Enter Requests by Course screens by selecting a different class section in the **Class** column.
2. Select the Students tab.

3. Select the rows of the students to transfer. You can select more than one student to transfer by holding down the **CTRL** key while selecting rows.

4. To transfer the selected students, click **Transfer** on the action bar. The Open screen appears.

   **Note:** The **Status** column appears on the Open screen if you are transferring only one student. If a class does not create a conflict in the student’s schedule, “OK” appears in the **Status** column. If the section creates a conflict, “Conflict” appears in the **Status** column.

5. Click **Find Now** to search for other sections of the course.

6. Select the section to which to transfer the students and click **Open**.

7. A message appears if the student has grades, skill ratings, or attendance recorded in the original section, stating that this information does not transfer to the new section. To continue and transfer the student, click **Yes**.

8. The program transfers the students and you return to the Students tab. In the **Status** column, the new enrollment of the transferred students appears.

9. To save the class record and return to the Master Schedule screen, click **Save and Close**.

   If you are currently tracking student schedule changes, changes to a student’s enrollment are recorded. For more information about student schedule changes, see “Viewing Student Schedule Changes and Adding Comments” on page 96.

- **Dropping a student from a class**

  **Note:** You can also open a class using the **Open a class** link on the Scheduling page.
1. From the List View or Grid View of the Master Schedule screen, select the class and click **Open** on the action bar. The class record appears.

![Class Schedule Screen](image)

**Note:** You can also drop students from the Schedule a Student or Enter Requests by Course screens by selecting a blank entry in the **Class** column.

2. Select the Students tab.

3. To unenroll a student from the class, unmark the checkbox in the **Enrolled?** column for the student.

4. If the current date is after the withdrawal date entered for the term, a message appears asking if you want to drop or withdraw the student. To drop a student from the class, click **Drop**.

5. A message appears stating that dropping the student will remove the student’s grades, skill ratings, and attendance entries in the class for the term. To continue and drop the student, click **Yes**.

6. To save the class record and return to the Master Schedule screen, click **Save and Close**.

   If you are currently tracking student schedule changes, changes to a student’s enrollment are recorded. For more information about student schedule changes, see “Viewing Student Schedule Changes and Adding Comments” on page 96.

- **Withdrawing a student from a class**

  **Note:** You can also open a class using the **Open a class** link on the Scheduling page.
1. From the List View or Grid View of the Master Schedule screen, select the class and click **Open** on the action bar. The class record appears.

![Class record](image)

**Note:** You can also withdraw students from the Schedule a Student or Enter Requests by Course screens by selecting a blank entry in the **Class** column.

2. Select the Students tab.

![Student list](image)

**Note:** If the current date is before the withdrawal date entered for the term, or there is no withdrawal date, a message appears confirming you want to drop the student.

3. To unenroll a student from the class, unmark the checkbox in the **Enrolled?** column for the student. If the current date is after the withdrawal date entered for the term, a message appears asking if you want to drop or withdraw the student.
4. Click **Withdraw**. The Details screen appears so you can enter withdrawal information for the student.

5. In the **Withdrawn date** row, the current date appears by default. You can edit the date.

6. In the **Withdrawn term** row, the current term appears by default.

7. In the grades grid, you can edit the grades for the student. The program stores these withdrawn grades for the class. To save the withdrawn grades and return to the class record, click **OK**.

8. Withdrawn students still appear in the grid and “Withdrawn” appears in the **Status** column. To return to the Details screen for a withdrawn student, you can select the student’s row and click **Edit Withdrawn Grades** on the action bar.

9. To save the class record and return to the Master Schedule screen, click **Save and Close**.

   If you are currently tracking student schedule changes, changes to a student’s enrollment are recorded. For more information about student schedule changes, see “Viewing Student Schedule Changes and Adding Comments” on page 96.

**Finding Free Teachers and Rooms**

When editing meetings on a class record, you can search for available teachers and rooms.
Finding free teachers and rooms

1. On the Meetings tab of a class record, select **Class, Find Free** from the menu bar. The Find Free screen appears.

2. In the **Find Free** field, select “Teachers and Rooms”, “Teachers only”, or “Rooms only”.

3. If you are searching for free teachers, in the **Faculty restrictions to follow** box, mark checkboxes for the restrictions to consider in searching.

4. If you are searching for free rooms, in the **Room restrictions to follow** box, mark checkboxes for the restrictions to consider in searching.

5. In the **Meetings to include** box, mark checkboxes for the meetings to consider.

6. To restrict the results to only the teachers and rooms specified as resources on the course record, mark **Only include resources selected on the course**.

7. In the filters grid, you can further refine the search for free teachers and rooms by specific meetings, faculty, or rooms. For more information about filtering, see the **Program Basics Guide**.
8. To begin the search, click **OK**. When the search is complete, the Preview Changes screen appears.

9. Free resources appear in the **Resources** column. Mark the **Schedule?** checkbox in each row for a resource to schedule.

10. When you are ready to schedule the selected resources and return to the Meetings tab, click **Schedule Now**.

### Printing Master Schedules

Before beginning the student scheduling process, you can run scheduling reports to review your master schedule. You can print Master Schedule Grid reports to review schedules in a grid format or print Schedule List reports to review schedules in a list format.

- **Printing a Master Schedule Grid report**
  1. On the Scheduling page, click **Print master schedule**. The Select a Parameter File screen appears.

    ![Select a Parameter File](image)

    2. Select the Master Schedule Grid report to use or click **Add New** to create a new report.

    For more information about the Master Schedule Grid report, see the Scheduling Reports chapter of the *Reports Guide for Registrar’s Office*.

    3. Print the report to review any changes you need to the master schedule before proceeding to student scheduling tasks.
Printing a Schedules List report

1. On the Scheduling page, click **Print master schedule list**. The Select a Parameter File screen appears.

![Select a Parameter File dialog box](image.png)

2. Select the Schedule Lists report to use or click **Add New** to create a new report.

   For more information about the Schedule Lists report, see the Scheduling Reports chapter of the *Reports Guide for Registrar’s Office*.

3. Print the report to review any changes you need to the master schedule before proceeding to student scheduling tasks.
Student Scheduling Tasks

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After scheduling classes, you can begin enrolling students into classes. On the Scheduling page, the student scheduling tasks appear as links in the Student Scheduling tasks list. You can generate and edit student schedules, clear student schedules, and print student schedules.

If you have NetClassroom, you can have students enroll in classes online. For more information about establishing your online enrollment process, see the Administration Guide for NetClassroom.

Generating Student Schedules

If you entered course requests, you can generating student schedules to automatically enroll students in classes according to their requests. You can create parameter files for generating student schedules and re-use parameter files.

When enrolling students in classes of a course, the program tries to fill up one class before using the next class, except when you select to balance gender across classes.

**Note:** Turn off tracking scheduling changes before generating student schedules.

We recommend you turn off tracking scheduling changes for the session before generating student schedules, to avoid recording all of the changes made by this automatic process. For more information, see “Checking Academic Year Setup” on page 18. If you are scheduling multiple schools at once, be sure to turn off tracking for each school.

- **Generating student schedules**

  **Note:** To open the Generate Student Schedules page, you can also click the Generate Student Schedules tab on the Scheduling page.

  1. On the Scheduling page, click **Generate student schedules**. The Generate Student Schedules page appears.
2. On the toolbar, click **New Generate Student Schedules**. The New Generate Student Schedules screen appears.

![New Generate Student Schedules](image)

- **Step 3:** In the **Academic year** and **Session** fields, select the year and session to schedule.

- **Step 4:** In the **Start with** field, select the first term to schedule. Any terms previous to the term you select are unaffected. You can also select “<All terms>“.

- **Step 5:** To save the current schedule as a scenario before beginning the processing, mark **Before processing, save a copy of the current scheduling scenario**.

- **Step 6:** To save the resulting schedule as a scenario after processing completes, mark **After processing, save a copy of the resulting scenario**.

**Note:** To generate student schedules for multiple schools at once, you can select “All Schools” in the **School** field on the Scheduling page.

3. In the **Academic year** and **Session** fields, select the year and session to schedule.

4. In the **Start with** field, select the first term to schedule. Any terms previous to the term you select are unaffected. You can also select “<All terms>“.

5. To save the current schedule as a scenario before beginning the processing, mark **Before processing, save a copy of the current scheduling scenario**.

6. To save the resulting schedule as a scenario after processing completes, mark **After processing, save a copy of the resulting scenario**.

**Note:** Creating a query saves you time when troubleshooting students with incomplete schedules, because you can select this query when editing student schedules.

7. To create a query so you can troubleshoot students with incomplete schedules, mark **Create an output query of students with incomplete schedules**.
8. To print a control report of the processing, mark **Print a control report on** and select a printer.

9. Select the General 2 tab.

10. To clear existing enrollments for the included requests, mark **Clear current enrollment for selected requests**. The program cannot clear enrollments if grades, skills, comments, or attendance exists for the class.

    **Note:** Rescheduling an enrollment never deletes an enrollment, just changes an enrollment to a different section.

11. To allow existing enrollments to be rescheduled if necessary to create a full schedule, mark **Reschedule current enrollment for**. For example, this is useful when you add a new class section.

    In the first field, select “Any student”, “Any selected student”, or “Current student only”.
• If you select “Any student”, the program can reschedule any other student, regardless of whether or not they are included in the current processing, in order to free up a seat in a full class for the current student being processed.

• If you select “Any selected student”, the program can reschedule another student included in the current processing in order to free up a seat in a full class for the current student being processed.

• If you select “Current student only”, the program can reschedule enrollment only within the schedule of the current student being processed.

In the second field, select “Any other section” or “Sections with the same teacher(s)”.

12. After processing is complete, to schedule free periods into existing sections of a particular course such as Study Hall, mark Fill free periods with sections of and select the course.

13. If your school is coeducational, you can select to balance genders in classes. Mark Balance genders based on and select “Specific ratio” or “Course request ratio”.

• If you select “Specific ratio”, fields are enabled for you to designate the male and female percents. For example, you can select to balance the class 50/50 between males and females.

• If you select “Course request ratio”, the program uses the ratio of males to females who requested the course. For example, if 60% of the students requesting the course are male and 40% are male, each class is balanced 60/40.

14. To allow students to be enrolled in their alternate courses, mark Consider alternate course requests if necessary. By not marking this checkbox, you can run initial passes of student schedules including only main requests.

**Note:** A student has a full schedule when all main course requests are fulfilled.

15. To allow partial schedules to be created, mark Create partial schedules for student that cannot be fully scheduled. If you do not mark this checkbox, a student schedule is not created if the student cannot have a full schedule.

16. To allow students to be scheduled in different class sections during the duration of a course, mark Allow students to take [] for each term of a course. In the field, select “Different sections with same teacher” or “Different sections with different teachers”. If the student is scheduled in a class without a teacher, the student can be scheduled in any section of the class. If you select “Different sections with the same teacher” and a class has multiple teachers, the student can be scheduled in a different section of the class with at least one of the same teachers.
17. Select the Advanced tab.

18. In the **Use these criteria when determining the best schedule for a student** box, select the criteria to use in processing. Arrange the selected criteria in the order to include in the processing, from first to last. To move a criterion, select it and click the up or down arrows to the right of the box.

When determining the best schedule for a student, the program looks for the highest number generated for the first criterion. If the first criterion's number is the same for all possible schedules, the program looks at the highest number generated for the second criterion, and so on.

- If you mark **Sum of weighted request priorities**, the program adds the weights of the course request priorities together (1 for Low, 2 for Standard, and 4 for High) of fulfilled requests.
- If you mark **Sum of weighted course scheduling priorities**, the program adds the weights of the course scheduling priorities together (1 for Low, 2 for Standard, and 4 for High) of fulfilled requests.
- If you mark **Total enrollment**, the program counts the class terms in which a student is enrolled. Total enrollment refers to one student only.
- If you mark **Number of singletons enrolled**, the program counts the number of class terms of singletons in which a student is enrolled.

**Note:** Criteria designate the most important characteristics of the schedule for students with more requests than they can take and students without full schedules.

19. In the **When choosing between students for a full class use this priority order** box, mark the priorities to use. Priorities include **Grade level** and **Request priority**. Arrange the priorities in the order to include in the processing, from first to last. To move a priority, select it and click the up or down arrows to the right of the box.

These priorities affect only students included in the current processing. A student with a lower priority can be bumped from a class to accommodate a student with a higher priority.

**Note:** Choosing between students occurs when there is not enough space in a class for everyone and the program determines which requests to fulfill. This is different from the rescheduling current enrollment setting on the General 2 tab which keeps students in the same course.
A student who can get a full schedule by enrollment in the class that will be full takes precedence over a student who cannot get a full schedule by enrollment in the class, regardless of grade level or request priority.

20. To limit the time to spend in processing trying to fulfill a schedule, mark **Limit processing time for students to a maximum of \[ \] seconds per pass** and enter a number of seconds. You can enter from one to 600 seconds.

If you have many course requests per student and many course rules, you probably need to enter more time. Experiment until you find the time that works best for your needs.

21. In the **Restrictions to Override** grid, you can select restrictions to override in processing. You would typically do this in subsequent runs to get a more complete schedule.

22. In the course rules grid, you can override the priority of an existing course rule on all course records. In the **Course Rules** column, select the rule. In the **Override 'When to Use'** column, select the priority to use: “Always”, “Try”, or “Ignore”.

23. Select the Filters tab.

24. In the filters grid, you can filter the students to include. For more information about filtering, see the **Program Basics Guide**.

25. To schedule additional classes according to course rules, mark **Include additional classes required to fulfill Course Rules**. Classes are included even if the class is excluded by a filter.

**Note:** You can filter by class to keep student groups together. You can filter by class teachers for team teaching.

24. In the filters grid, you can filter the students to include. For more information about filtering, see the **Program Basics Guide**.

25. To schedule additional classes according to course rules, mark **Include additional classes required to fulfill Course Rules**. Classes are included even if the class is excluded by a filter.

**Note:** If you click **Stop**, the processing stops but any changes already made by the processing remain. To restore the schedules to how they were before you began generating student schedules, you must have an applicable scenario to restore.
26. To generate the student schedules, click **Schedule Now**. A processing screen appears.

![Generate Student Schedules](image)

**Tip:** After you schedule students, you can print a class roster in **Reports, Course/Class Reports**. The Class Report lists the students enrolled in each class for a selected academic year, session, and term.

27. When scheduling is complete, a finish screen appears displaying the number of students processed and completely scheduled, the number of incomplete students, the number of requests processed and completed, and the elapsed time. You can also print a control report from the finish screen.

## Editing Student Schedules

On the Schedule a Student screen, you enroll students in classes. If you automatically generated student schedules, you automatically enrolled students in classes and you can edit student schedules as necessary on this screen.

There are three different views to the Schedule a Student screen: Request, List, and Schedule. You previously used the Request and List Views of the Schedule a Student screen when entering course requests by student. You can switch between views using the **View** menu on the menu bar of the Schedule a Student screen, or using buttons on the toolbar.

When editing student schedules, keep in mind how the **Reflect student schedule changes** business rule affects student schedules. If this business rule is marked, changing a student’s enrollment also updates the enrollment in other terms. You may want to set the business rule to reflect “in all terms” when you are first editing student schedules for the year, and then for editing during the year, either change the setting to “in subsequent terms” or unmark the business rule so changes are not reflected at all in other terms.

You can set user options for the colors that appear on student schedules, for example, to indicate conflicting classes, any term requests, partial requests, mandatory courses, enrolled classes, full classes, and more available classes. Select **Tools, Options** from the menu bar. On the Options screen, select the Color tab and select **Student Schedules** from the list on the left.

To open the Schedule tab of the student record from the Schedule a Student screen, you can select **Schedule, View Student Schedule** from the menu bar.

If you are currently tracking student schedule changes for the selected school, academic year, and session (as designated on the session record in **Configuration**), you can view changes to a student’s schedule by selecting **Schedule, Schedule Changes** from the menu bar. For more information, see “Viewing Student Schedule Changes and Adding Comments” on page 96.

When tracking changes, and facing a challenging scheduling situation for a student, you may move among the views of the Edit Student Schedules screen and save changes often. At these times, we recommend you use the Potential Student Schedules report to help you determine the student’s schedule to avoid recording a lot of changes. For more information about the Potential Student Schedules report, see the Request Reports chapter of the **Reports Guide for Registrar’s Office**. To keep the recorded Schedule Changes useful, we also recommend you add comments to changes explaining why they were made.

**Note:** Students can enroll in classes online through **NetClassroom**.

If you have **NetClassroom**, you can have students enroll in classes online. For more information about establishing your online enrollment process, see the **Administration Guide for NetClassroom**.
Editing Student Schedules in the Request View

The Request View of the Schedule a Student screen is the same screen you used to enter course requests if you clicked **Enter requests by students** on the Scheduling page.

When editing student schedules in the Request View, you can edit course requests and select a class section for a course request to enroll a student in a class automatically.

You are not required to enter course requests before enrolling students in classes. To quickly add a class, you can click **Select a Class** on the action bar to search for the class.

From the Request View, you can run a Student Requests report by selecting **File**, **Preview** or **Print**. For more information about the Student Requests report, see the Request Reports chapter of the *Reports Guide for Registrar's Office*.

You can access the Generate Student Schedules utility from the Request View if necessary. Click **Generate Schedule** on the action bar. For more information about generating student schedules, see “Generating student schedules” on page 80.

- **Editing a student schedule in Request View**
  1. On the Scheduling page, select the school, academic year, and session of the student schedules to edit.
  2. Click **Edit student schedules**. The Schedule a Student screen appears.
  3. From the menu bar, select **View**, **Request View**.
  4. In the **School** field, select the school of the student.
  5. In the **Academic year** and **Session** fields, select the time frame to edit.
     You can access students with student progression entries for the selected school and academic year.
  6. In the **Term** field, select the term or terms to appear. The selected school, academic year, and session determine which terms are available.
     Because courses in other schools may not have the same terms as the selected school, if the student has requests for courses in other schools, select “<All Terms>” to also include these requests. However, if another school has a same term as the selected school, such as Fall, requests entered for the other school also appear if you select “Fall”.
  7. In the **Enter for** field, select a group of students. You can select all students or a query.
     To create a new query, click the binoculars to access the Open Query screen, then click **Add a New Query**. For more information about creating queries, see the *Query Guide*. 
8. In the Student field, enter the student for which to edit schedules. You can click the binoculars to search for the student. You can use the scroll buttons to scroll through the group of students.
   The student’s nickname, if any, and grade level appear to the right of the Student field.
   The course request grid for the student appears at the bottom of the screen.

   **Note:** If you do not need the requested teacher or alternate columns, you can turn these off in the grid. Select Tools, Options to control these columns.

9. You may have already entered course requests during the scheduling process. However, you can add or delete course requests in the grid if necessary when editing a student schedule. For more information about entering course requests, see “Entering Requests by Student in the Request View” on page 25.

10. To open the course record to view the class meeting times, right-click the row and select Open Main Request Course or Open Alternate Request Course.

   **Note:** You can also press F7 to search for a class.

11. In the Class column, you can automatically enroll the student in a class section by selecting an available class. If there is a conflict, a C appears in the column to the left of the course.
   You can also select a different class section to transfer a student or select a blank entry to drop or withdraw the student. For more information, see “Transferring, Dropping, and Withdrawing Students” on page 94.
   If you are tracking student schedule changes, changes in this column are recorded. For more information, see “Viewing Student Schedule Changes and Adding Comments” on page 96.
   If the main request cannot be fulfilled, you can select an available class in the Alternate Class column. If you selected a class for the main request, you cannot select a class in this column, and vice versa.

12. If lunches are defined using entire periods on the associated timetable, you can click Lunch on the action bar to view and edit the student’s lunches. For more information, see “Editing Student Lunches” on page 93.

   **Note:** The Class and Alternate Class columns do not appear in the Request View if the business rule Reflect class schedule changes is not marked.

13. To clear all rows without classes selected, you can click Clear on the action bar and select Unfulfilled requests.

14. To clear all classes in the Class column, you can click Clear on the action bar and select Classes.

15. To save the student schedule and return to the Scheduling page, click Save and Close.

---

## Editing Student Schedules in the List View

You may have already used the List View of the Schedule a Student screen when entering course requests. When editing student schedules at this stage, you can edit course requests and select a class section for a course request to enroll a student in a class automatically.

You are not required to enter course requests before enrolling students in classes. To quickly add a class, you can click Select a Class on the action bar to search for the class.

From the List View, you can run a Schedule Lists report by selecting File, Preview or Print. For more information about the Schedule Lists report, see the Scheduling Reports chapter of the Reports Guide for Registrar’s Office.

You can access the Generate Student Schedules utility from the List View if necessary. Click Generate Schedule on the action bar. For more information about generating student schedules, see “Generating student schedules” on page 80.
Editing a student schedule in List View

1. On the Scheduling page, select the school, academic year, and session of the student schedules to edit.
2. Click **Edit student schedules**. The Schedule a Student screen appears.
3. From the menu bar, select **View, List View**.

4. In the **School** field, select the school of the student.
5. In the **Academic year** and **Session** fields, select the time frame to edit.

   You can access students with student progression entries for the selected school and academic year.

   **Note:** If you select “<All Terms>”, each term appears in the grid as a column with subcolumns.

6. In the **Term** field, select a specific term or “<All Terms>”.

   If the student has requests for courses in other schools, these requests will not appear unless the other school has the same term as the selected school.

7. In the **Enter for** field, select a group of students. You can select all students or a query.

   To create a new query, click the binoculars to access the Open Query screen, then click **Add a New Query**. For more information about creating queries, see the **Query Guide**.

8. In the **Student** field, enter the student for which to edit schedules. You can click the binoculars to search for the student. You can use the scroll buttons to scroll through the group of students.

   The student’s nickname, if any, and grade level appear to the right of the **Student** field.

   **Note:** If you do not need the requested teacher or alternate columns, you can turn these off in the grid. Select **Tools, Options** to control these columns.

   The course request list for the student appears at the bottom of the screen. Each selected term appears as a column with subcolumns.

9. You may have already entered course requests during the scheduling process. However, you can add or delete course requests in the grid if necessary when editing a student schedule. For more information about entering course requests, see “Entering Requests by Student in the Request View” on page 25.

10. To open the course record to view the class meeting times, right-click the row and select **Open Main Request Course** or **Open Alternate Request Course**.

   **Note:** You can also press F7 to search for a class.
11. In the **Class** column, you can automatically enroll the student in a class section by selecting an available class. If there is a conflict, a C appears in the column to the left of the course. You can also select a different class section to transfer a student or select a blank entry to drop or withdraw the student. For more information, see “Transferring, Dropping, and Withdrawing Students” on page 94. If you are tracking student schedule changes, changes in this column are recorded. For more information, see “Viewing Student Schedule Changes and Adding Comments” on page 96. If the main request cannot be fulfilled, you can select an available class in the **Alternate Class** column. If you selected a class for the main request, you cannot select a class in this column, and vice versa.

**Note:** In Options, you can control how the cycle day appears, by Day or Display Code.

In the **First Meeting** column, the first meeting of the selected class appears for informational purposes only.

12. If lunches are defined using entire periods on the associated timetable, you can click **Lunch** on the action bar to view and edit the student’s lunches. For more information, see “Editing Student Lunches” on page 93.

13. To clear all rows without classes selected, click **Clear** on the action bar and select **Unfulfilled requests**.

14. To clear all classes in the **Class** column, click **Clear** on the action bar and select **Classes**.

15. To reset the values in the **Class** columns to the previously saved values, click **Reset to Original**.

16. To save the student schedule and return to the Scheduling page, click **Save and Close**.

## Editing Student Schedules in the Schedule View

**Note:** You can set user options for colors to appear on student schedules, such as for conflicts. From the right-click menu, select **Legend**.

In the Schedule View, you can view a student’s course requests and enroll them in classes by selecting class sections. Consider the Schedule View an interactive version of the Potential Student Schedule report. In the schedule grid, you can see how different class sections affect the student’s schedule. Codes appear beside section numbers to indicate how each section works with the time or block.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>E</td>
<td>The student is enrolled in the class section.</td>
</tr>
<tr>
<td>C</td>
<td>The class section conflicts with another class the student is enrolled in somewhere in the cycle.</td>
</tr>
<tr>
<td>F</td>
<td>The class section is full, based on either the target class size or room capacity.</td>
</tr>
<tr>
<td>M</td>
<td>The class section is full, based on either the maximum class size or room capacity.</td>
</tr>
<tr>
<td>+</td>
<td>More class sections of the course are available in the meeting time. The section that appears has the highest number of available seats.</td>
</tr>
<tr>
<td>S</td>
<td>The class section conflicts with a scheduled class in a different session and school (if sessions occur on same dates).</td>
</tr>
</tbody>
</table>
From the Schedule View, you can run a Schedules report by selecting **File**, **Preview** or **Print**. For more information about the Schedules report, see the Scheduling Reports chapter of the *Reports Guide for Registrar’s Office*.

You can access the Generate Student Schedules utility from the Schedule View if necessary. Select **Schedule**, **Generate Schedule** from the menu bar. For more information about generating student schedules, see “Generating student schedules” on page 80.

**Editing a student schedule in Schedule View**

1. On the Scheduling page, select the school, academic year, and session of the student schedules to edit.
2. Click **Edit student schedules**. The Schedule a Student screen appears.
3. From the menu bar, select **View**, **Schedule View**.
4. In the **School** field, select the school of the student.
5. In the **Academic year** and **Session** fields, select the time frame to edit.
6. In the **Term** field, select a specific term or “<All Terms>”.
7. In the **Enter for** field, select a group of students. You can select all students or a query.
   To create a new query, click the binoculars to access the Open Query screen, then click **Add a New Query**. For more information about creating queries, see the *Query Guide*.
8. In the **Student** field, enter the student for which to edit schedules. You can click the binoculars to search for the student. You can use the scroll buttons to scroll through the group of students.
   The student’s nickname, if any, and grade level appear to the right of the **Student** field.
   Each row in the grid contains a main request, alternate request if any, and request priority. You cannot edit this information in this view.
9. In the Show field, select “Time”, “Period”, or “Block” to control how the meeting columns appear. If you select “Time” or “Period” in the Show field, select “<All Meetings>” or “First Meetings Only” in the next field.

If you select “Block”, a No Block column appears showing classes with meetings that are not within the block or without meetings.

If you select “Time” or “Period”, a No Meetings column appears showing classes without meetings.

10. To enroll a student in a class section, select the section number in the Class column. The grid refreshes to show how the selected class section affects the student’s schedule.

A key to the grid appears at the bottom of the screen. If you do not see this key, select View, Show Class Code Key from the menu bar.

If you are tracking student schedule changes, changes in the Class column are recorded. For more information, see “Viewing Student Schedule Changes and Adding Comments” on page 96.

11. To transfer a student to a different section, select a different class section in the Class column.

12. To drop or withdraw a student, select a blank entry in the Class column. For more information, see “Transferring, Dropping, and Withdrawing Students” on page 94.

13. If lunches are defined using entire periods on the associated timetable, you can click Lunch on the action bar to view and edit the student’s lunches. For more information, see “Editing Student Lunches” on page 93.

14. To determine where students have free time in their schedule in the selected academic year and session, click Calculate Free Time on the action bar. The Free Time screen for the student appears.

15. In the Free Time grid, you can view the terms, days, and times in which the student is currently not scheduled. If the times match period times, the periods also appears.

16. If the business rule Allow students to take a maximum of [ ] classes per term is set and a value is entered, the Number of classes needed to reach maximum for each term grid appears on the Free Time screen. In this grid, you can see the number of classes remaining in each term before the student will reach the maximum number.

17. To close the Free Time screen, click Close.
18. To open a course record, right-click the row of the course and select **Open Course**.
19. To save the student schedule and return to the Scheduling page, click **Save and Close**.

### Editing Student Lunches

If you generated student schedules and lunches are defined using entire periods on the associated timetable, you can edit lunch assignments for each student.

- **Editing a student’s lunch assignment**
  1. On the Scheduling page, select the school, academic year, and session of the student schedule to edit.
  2. Click **Edit student schedules**. The Schedule a Student screen appears. You can edit lunches in any of the three views.
  3. In the **School** field, select the school of the student.
  4. In the **Academic year** and **Session** fields, select the time frame to edit.
  5. In the **Term** field, select a specific term or “<All Terms>”.
  6. In the **Enter for** field, select a group of students. You can select all students or a query.
  7. In the **Student** field, enter the student for which to edit schedules. You can click the binoculars to search for the student. You can use the scroll buttons to scroll through the group of students.
  8. On the action bar, click **Lunch**. The Lunch screen appears.

![Lunch screen](image)

**Note:** You can edit lunches only if lunches are defined using entire periods on the associated timetable.

9. In the **Term** column, select the term for the lunch. You can select one lunch per term.
10. In the **Lunch** column, select the lunch.

   After you select a lunch, information about the lunch appears in the **First Meeting** and **Period** columns.
If a selected lunch conflicts with another meeting on the student's schedule, a red C appears in the first column.

11. When you have finished editing a student’s lunch assignments, click **OK** to return to the Schedule a Student screen.

**Transferring, Dropping, and Withdrawing Students**

Using the **Class** column on the Schedule a Student screen, you can transfer a student to a different class section, or drop or withdraw a student from a class.

If you are currently tracking student schedule changes, the program records transferring, dropping, and withdrawing activity. For more information, see “Viewing Student Schedule Changes and Adding Comments” on page 96.

You can also perform these tasks from the Students tab of meeting records. For more information, see “Managing Classes and Meetings” on page 60.

**Note:** You can transfer multiple students at the same time from the Students tab of the class record. For more information, see “Managing Classes and Meetings” on page 60.

**Dropping.** Dropping a student removes all grades, skill ratings, and attendance entries for the student in the class for the current term and the class cannot appear on report cards and transcripts for the current term.

**Withdrawing.** You can withdraw a student only after the withdrawal date entered for the term on the academic year record in **Configuration**. When you withdraw a student, all grades, skill ratings, and attendance entries for the student in the class for the current term remain and can be included on report cards and transcripts for the current term.

**Transferring.** When you transfer a student into a different class section, all existing grades, skill ratings, and attendance entries for the student remain in the original class section and you can enter new grades, skill ratings, and attendance entries for the student in the new class section. The program processes information for the new and original sections as one entity because they are associated with the same course. Therefore, only one row appears for the course on report cards and transcripts:

- If you transfer a student to a new section within a term, the row on report cards and transcripts lists only the new section and teacher name.
- If you transfer a student to a new section across terms (for example, the student is in section 1 in Fall and section 2 in Spring) and print report cards and transcripts for both terms, the row lists the original section and teacher name for the first term and the new section and teacher name for the second term.

In **Faculty Access for the Web**, by marking the option **Show students with historical information**, users can view grade and skill rating information for transferred students in their original class sections.
Reflecting changes in all or subsequent terms. When editing student schedules, keep in mind how the Reflect student schedule changes business rule affects student schedules. If this business rule is marked, changing a student’s enrollment also updates the enrollment in other terms. You may want to set the business rule to reflect “in all terms” when you are first editing student schedules for the year, and then for editing during the year, either change the setting to “in subsequent terms” or unmark the business rule so changes are not reflected at all in other terms.

- **Dropping a student**
  1. On the Scheduling page, select the school, academic year, and session of the student schedule to edit.
  2. Click Edit student schedules. The Schedule a Student screen appears.
  3. In the School field, select the school of the student.
  4. In the Academic year and Session fields, select the time frame to edit.
  5. In the Term field, select a specific term or “<All Terms>”.
  6. In the Enter for field, select a group of students. You can select all students or a query.
  7. In the Student field, enter the student for which to edit schedules. You can click the binoculars to search for the student. You can use the scroll buttons to scroll through the group of students.
  8. To drop the student from a course, select the blank entry in the Class column.
  9. If the current date is after the withdrawal date entered for the term, a message appears asking if you want to drop or withdraw the student. To understand what a drop or withdraw mean in the system, click the help link. To drop a student from the class, click Drop.
  10. A message appears stating that dropping the student will remove the student’s grades, skill ratings, and attendance entries in the class for the term. To continue and drop the student, click Yes.
  11. A message appears stating that the enrollment has been removed and asking if you want to remove the request also. To continue and remove the request, click Yes.

- **Withdrawing a student**
  1. On the Scheduling page, select the school, academic year, and session of the student schedule to edit.
  2. Click Edit student schedules. The Schedule a Student screen appears.
  3. From the menu bar, select View, Schedule View.
  4. In the School field, select the school of the student.
  5. In the Academic year and Session fields, select the time frame to edit.
  6. In the Term field, select a specific term or “<All Terms>”.
  7. In the Enter for field, select a group of students. You can select all students or a query.
  8. In the Student field, enter the student for which to edit schedules. You can click the binoculars to search for the student. You can use the scroll buttons to scroll through the group of students.
  9. To withdraw the student from a course, select the blank entry in the Class column.

  **Note:** If the current date is before the withdrawal date entered for the term, or there is no withdrawal date, a message appears confirming you want to drop the student.

  10. If the current date is after the withdrawal date entered for the term, a message appears asking if you want to drop or withdraw the student. Click Withdraw.
  11. The Details screen appears so you can enter withdrawal information for the student.
  12. In the Withdrawn date row, the current date appears by default. You can edit the date.
  13. In the Withdrawn term row, the current term appears by default.
  14. In the grades grid, you can edit the grades for the student. The program stores these withdrawn grades for the class. To save the withdrawn grades and return to the Schedule a Student screen, click OK.
Transferring a student

1. On the Scheduling page, select the school, academic year, and session of the student schedule to edit.
2. Click **Edit student schedules**. The Schedule a Student screen appears.
3. In the **School** field, select the school of the student.
4. In the **Academic year** and **Session** fields, select the time frame to edit.
5. In the **Term** field, select a specific term or “<All Terms>”.
6. In the **Enter for** field, select a group of students. You can select all students or a query.
7. In the **Student** field, enter the student for which to edit schedules. You can click the binoculars to search for the student. You can use the scroll buttons to scroll through the group of students.
8. To transfer the student to a different section of a course, select the class section in the **Class** column.
9. A message appears if the student has grades, skill ratings, or attendance recorded in the original section, stating that this information does not transfer to the new section. To continue and transfer the student, click **Yes**.

Viewing Student Schedule Changes and Adding Comments

On session records in **Configuration**, you can designate when to begin tracking student schedule changes, including classes dropped, added, transferred, or withdrawn. You can view the changes the program records on the Schedule Changes screen and add comments about each change.

You can access the Schedule Changes screen from the Schedule a Student screen, Enter Requests by Course screen, Students tab of a class record, or Schedule tab of a student record. To access the Schedule Changes screen, tracking changes must be turned on for the session.

The Drop/Add Report is also useful for reviewing schedule changes by student, teacher, or class. For more information about the Drop/Add Report, see the Scheduling Reports chapter of the **Reports Guide for Registrar’s Office**.

If a class has been deleted, changes for students for that class are retained but are not associated with the class that does not exist anymore. This means that these changes are not available when you filter by class in query, export, or on the Drop/Add Report.

Viewing a student’s schedule changes and adding comments

1. On the Scheduling page, select the school, academic year, and session of the student schedule to edit.
2. Click **Edit student schedules**. The Schedule a Student screen appears.
3. From the menu bar, select **Schedule, Schedule Changes**. The Schedule Changes screen appears.

![Schedule Changes Screen](image)

**Note:** To quickly create a spreadsheet of the schedule changes for review, right-click the grid and select **Export Scheduling Change grid to Excel**.

4. In the **Show** field, you can select to show all terms or filter the changes appearing in the grid by a specific term.

   Each change appears as a row in the grid, listing the previous setting, new setting, date of the change, user who made the change, type of change (Drop, Add, Withdrawn, Transfer), and a comment field.

   Changes associated with deleted classes appear in green text by default. You can change this color in Options by right-clicking the grid and selecting **Legend**.

5. You can edit the **Comments** column.

6. To save your comments and close the Schedule Changes screen, click **OK**.

**Scheduling Walk-In Students**

When you click the **Walk-in scheduler** link on the Scheduling page, the Schedule a Student screen opens to the Schedule View. From the Schedule View, you can manually enroll a student in courses while viewing the class schedule. The Schedule View is also useful during your drop/add period. For more information about the Schedule View, see “Editing Student Schedules in the Schedule View” on page 90.

To enter course requests, use the Request View or List View. For more information about entering course requests by student, see “Entering Course Requests by Student” on page 25.

**Clearing Student Schedules**

**Note:** Be careful when clearing schedules. Cleared schedules can be recovered only by restoring a database backup or scheduling scenario.

You can clear schedules for specific students at one time. For example, if a course is no longer offered due to an insufficient number of requests, but some students are already enrolled in classes of the course, you can remove those enrolled students from all of their classes. Then you can replace the request with another course and generate schedules for those students again.

To prevent loss of data, the program does not clear schedules for students with any marking column grades or skill ratings entered in any of their classes.

If the withdrawal date of a term has passed, you will receive a message the program will drop but not withdraw the students from the class and you can decide whether or not to continue.
To avoid recording all of the changes made by clearing student schedules, you may want to turn off tracking schedule changes for the session while running this process. For more information, see “Checking Academic Year Setup” on page 18.

- **Clearing student schedules**
  1. On the Scheduling page, click **Clear student schedules**. The Clear Student Schedules screen appears, open to the General tab.

![Clear Student Schedules](image)

2. In the **School** field, select the school containing the schedules to clear.
3. In the **Academic Year** field, select the academic year containing the schedules to clear.
4. In the **Session** field, select the session containing the schedules to clear.
5. In the **Clear these terms** box, mark checkboxes for the terms of the sessions in the academic year to clear.
6. To save a copy of the current schedule as a scenario before clearing schedules, mark **Before processing, save a copy of the current scheduling scenario as** and enter a name for the scenario. We recommend you do this in case you need to restore to the last scenario before clearing schedules.
7. To print a control report of the scheduled cleared, mark **Print a control report on** and select a printer.
8. Select the Filters tab. On the Filters tab, you can refine your selection of students to include by name, grade level, or homeroom teacher. For more information about filtering, see the *Program Basics Guide*.

9. Before clearing the schedules, click **Preview Changes**. The Preview Changes screen appears.

10. Each student with a schedule to be cleared appears in a row. In the **Clear?** column, you can unmark the checkbox to exclude the student from the processing.

11. When you are ready to clear the schedules, click **Clear Now**. This drops the selected students from their classes in the selected academic year, session, and terms.
Printing Schedules

Once you have finalized schedules, you can print them to review and hand out. For example, you can give students and teachers copies of their schedules.

For more information about the Schedules report, see the Scheduling Reports chapter of the Reports Guide for Registrar’s Office.

Printing student schedules

1. On the Scheduling page, click **Print schedules**. The Select a Parameter File screen appears.

2. Select the Schedules report to use or click **Add New** to create a new report.

3. Print the report to review or hand out.
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