Scheduling Parallel

Contents
Adding Students to Teams ............................................................................................................................ 3
  Registration Assignment ............................................................................................................................. 3
  House/Team Assignment by Course ......................................................................................................... 6
Student Course Requests ............................................................................................................................... 7
  Entering Requests through Home Access Center (HAC) ...................................................................... 7
  Request Entry in eSchoolPLUS .............................................................................................................. 9
Pre-Scheduler Reports ................................................................................................................................ 13
  Conflict Matrix ................................................................................................................................. 13
  Pre-Assignment Class Lists ................................................................................................................. 14
  Simple Tally ........................................................................................................................................ 15
  Student Request Detail ........................................................................................................................... 16
  Student Request Summary ..................................................................................................................... 17
  Student Request Verification .................................................................................................................. 18
Master Schedule ......................................................................................................................................... 19
  Adding a Course ...................................................................................................................................... 19
    Single Session One Period One Semester ...................................................................................... 21
    Single Session Two Periods ............................................................................................................... 21
    Multiple Session .............................................................................................................................. 22
  Adding a Block Course ............................................................................................................................. 23
Whiteboard ................................................................................................................................................. 25
  Filtering for a Team ............................................................................................................................... 25
  Adding a Course ...................................................................................................................................... 26
    Single Session ...................................................................................................................................... 26
    Single Session Two Periods ............................................................................................................... 27
    Multiple Session .............................................................................................................................. 28
  Adding a Block Course ............................................................................................................................. 31
Master Schedule Reports ............................................................................................................................ 32
  Master Schedule List ............................................................................................................................. 32
  Whiteboard Export ................................................................................................................................ 33
  Room Availability .................................................................................................................................... 34
Seat Availability ....................................................................................................................................... 35
Teacher Availability ................................................................................................................................. 36
Class Matrix ............................................................................................................................................. 37
Locking a Student into a Course Section ..................................................................................................... 38
Scheduling Error Scan ................................................................................................................................ 39
Schedule Students Parameters ................................................................................................................... 40
Schedule Students ....................................................................................................................................... 41
Reports to Analyze a Scheduling Run .......................................................................................................... 43
   Student Conflict Analysis ....................................................................................................................... 43
   Unscheduled Request Summary ............................................................................................................ 44
   Unscheduled Request Detail .................................................................................................................. 45
   Free Period Analysis ............................................................................................................................. 46
Viewing Conflicts in Whiteboard ................................................................................................................ 47
Backup/Restore ........................................................................................................................................... 49
Scheduled Course Load/Unload/Lock/Erase .............................................................................................. 50
Final Reports ............................................................................................................................................... 52
   Student Schedules ................................................................................................................................ 52
   Teacher Schedules .................................................................................................................................. 54
   Teacher Schedule Matrix ........................................................................................................................ 55
   Class Lists ................................................................................................................................................ 56
Adding Students to Teams

Registration Assignment

Registration > Utilities > Tools > Registration Assignment

Assigning students to Teams with Registration Assignment

1. Enter Registration Assignment in Quick Search or choose Registration, Utilities, Tools, Registration Assignment from the menu.
2. Select your building.
3. In the Field, select House/Team to update the current year team or Next Year House/Team to update the students’ teams for next year.
4. Choose your Fill Method. Think of Balance as dealing a deck of cards. Registration Assignment will assign the first student to the first team, the second student to the second team, continuing until all students are assigned. The Fill option will fill the first team then move on to the second. Fill is a useful option for assigning students in alphabetical order, for example.
5. Enter the maximum number of students that may be assigned to a team.
6. Select the teams in the Values field.
7. In the Filter panel, enter your filter criteria. The sample above is pulling all active and pre-registered students in grade 10.

8. In the Sort panel, choose the order in which students should be assigned. The sample above will assign students who are female first, then males, in alphabetical order.

9. Click the Load Records button to retrieve your listing of students.

10. You may manually update students, as needed, by clicking the Edit pencil.
11. If you change your Sort, remodel the students to reassign the students to Teams.

12. After making any adjustments, click the Run button to assign the students to their teams.
House/Team Assignment by Course
Registration > Utilities > Tools > House/Team Assignment by Course

Steps to assign House/Team by Course

1. Schedule students without house/team restrictions. (Refer to page
2. Enter House/Team Assignment by Course in Quick Search or select Registration, Utilities, Tools, House/Team Assignment by course from the menu.
3. Select your Building.
4. Select Value from Course/Section in the Set House Team to prompt.
5. Check the Override Existing Values checkbox.
6. In the Course/Section panel, list each course and section that will be used for assigning teams. For example, if you want to assign students to teams based upon their current English class placements, enter each English class course and section.
7. Click Run.
8. Erase All scheduled courses. (Refer to page
9. Schedule students with house/team restrictions. (Refer to page
Student Course Requests

Entering Requests through Home Access Center (HAC)

1. Enter the Student Id or name in Quick Search.
2. Enter Addresses in Quick Search or choose Registration, Entry and Reports, Student Demographics, Addresses from the menu.
3. Choose the additional options drop down on the Email and Login panel and choose Impersonate – HAC.
4. In Home Access Center, click the Classes button.
5. Then click the Requests tab.
6. Click the Edit button next to the Subject area for which you want to enter a request.

7. Check the box next to the course you want to request.
8. To mark the request as an alternate, choose the Alternate to this Course option in the Alternate column, and then select the regular request course for which this course is an alternate.
9. Click Save.
Request Entry in eSchoolPLUS

Check your School Year

Environment

Server
YSLTRAINESP1

Database
YSL_Train

School Year
2017-2018 School Year

Summer School

User to Impersonate

OK
Entering Requests for an Individual Student

1. Enter your Student Id or Name in Quick Search.
2. When the Student Summary page appears, enter Requests in Quick Search or select Scheduling, Student Schedules, Requests from the menu.
3. Enter the courses or use the magnifying glass to look up a course code.
4. To mark a course as an alternate, select C-Student/Course Alternate and then select the regular course request for which this course is an alternate.

5. The Alternate Sequence field allows you to enter more than one alternate for any regularly requested course.

6. After entering all requests, click Save.
Mass Loading Requests to a Group of Students

1. Enter Request Load in Quick Search or select Scheduling, Student Schedules, Student Utilities, Request Load/Unload/Erase from the menu.
2. Select your building.
5. Select Request Type Regular.
6. In the Courses panel, enter the Course(s) to load to students’ requests.
7. In the Filter panel, enter criteria to select your students. The sample criteria above will select all active students who will be in grade 9 next year.
8. After entering your filter information, be sure to click Refresh prior to clicking the Run arrow.
9. Click Run.
1. Enter Conflict Matrix in Quick Search or select Scheduling, Student Schedules, Pre-Scheduler Reports, Conflict Matrix from the menu.
2. Select your Building.
3. Matrix Type of Book will provide a portable format. You may select Grid if you prefer to layout the matrix on a large table.
4. Select a Scheduling Interval of Yearly.
5. Select All in the Singletons or Doubletons prompt to include all courses in the report.
6. Enter a Conflict Threshold of 0 to include all courses.
7. You may optionally choose to include Alternates.
8. In the Filter panel, you may want to enter Demographic, Current Status, = equals, Active if you have Inactive students with requests.
9. Click Run.
1. Enter Pre-Assignment Class Lists in Quick Search or select Scheduling, Student Schedules, Pre-Scheduler Reports, Pre-Assignment Class Lists from the menu.
2. Select your building.
3. Select the Scheduling Interval of Yearly.
4. Select to include only students who have a regular request for the course in the Request Type field.
5. Select to Always Print Student Phone Number.
6. Check the Include FERPA Information box if you want to include phone numbers that students have requested not be released.
7. In the Filter panel, you may want to include an Area of Demographic, Field Name of Current Status, Condition of = equals, and Value of Active.
8. Click Run.
1. Enter Simple Tally in Quick search or select Scheduling, Student Schedules, Pre-Scheduler Reports, Simple Tally from the menu.
2. Select your building.
3. Select a Scheduling Interval of Yearly.
4. Click the asterisk to add all grade levels, or select individual grade levels to be included in your report.
5. Click Request Type of All.
6. Group by Grade to see how many students by grade level have requested specific courses. You may also choose Gender, Race or Classification as Group by option.
7. In the Filter panel, you may want to include an Area of Demographic, Field Name of Current Status, Condition of = equals, and Value of Active.
8. Click Run.
1. Enter Student Request Detail in Quick Search or choose Scheduling, Student Schedules, Pre-Scheduler Reports, Student Request Detail from the menu.
2. Select your building.
3. Select a Scheduling Interval of Yearly.
4. Use the Filter panel to select which students to include on the report. The sample filter above will display Active and Pre-registered students.
5. Click Run.
1. Enter Student Request Summary in Quick Search or select Scheduling, Student Schedules, Pre-Scheduler Reports, Student Request Summary from the menu.
2. Select your building.
3. Select a Scheduling Interval of Yearly.
4. You may select to see Regular Requests Only or All Requests in the Request Type field.
5. Optionally, you may choose to only include students with requested credits outside a minimum and maximum range.
6. In the Filter panel, you may want to include an Area of Demographic, Field Name of Current Status, Condition of = equals, and Value of Active.
7. Click Run.
1. Enter Student Request Verification in Quick Search or select Scheduling, Student Schedules, Pre-Scheduler Reports, Student Request Verification from the menu.
2. Select your building.
3. Select a Scheduling Interval of Yearly.
4. If needed, you may include a Parent Signature line at the bottom of the report.
5. If you would like to mail the report home, you may choose to Print Addresses and then choose the location.
6. Enter an optional Message to Parents.
7. In the Filter panel, you may want to include an Area of Demographic, Field Name of Current Status, Condition of = equals, and Value of Active.
8. Click Run.
Master Schedule
Adding a Course
Scheduling > Courses > Course Sections > Master Schedule

Single Session Course

1. Enter Master Schedule in Quick Search or select Scheduling, Courses, Course Sections, Master Schedule from the menu.
2. Click to + to add a new course section.
3. Select or enter the Course code.
4. The next available Section number will default.
5. Many of the fields will default from the Course Catalog.
6. You may need to add House Team to restrict the course section to students on a selected Team.
7. You may also need to select an appropriate Gradebook Category Type.
8. In the Session Information panel, select the start period.
9. The sample course above is a first semester course. Click to post the red circle icon any marking period in which the course will not meet.
10. You may also click to deselect Cycles if a course does not meet every day.
11. Select the Primary Staff teacher.
12. You may optionally select one or more Secondary Staff, if needed.
13. Select the Room in which the course will meet.

14. The Mark Reporting information will default from the Course Catalog.
15. Click Save.
Single Session One Period One Semester
This Session Information panel shows a sample session that meets for one period, first semester.

Single Session Two Periods
This Session Information panel shows a sample session that meets for more than one period.

In this scenario, teachers will take attendance once, and the attendance will be applied to periods P1 and P2.
**Multiple Session**

When a course meets for multiple periods, but skips a period in between for lunch, you must create two sessions.

First create the initial session, then click the plus sign in the Session 1 ribbon:

A second session panel will appear:

Think about the Mark Reporting and Attendance Information. You may only need to issue marks once, and if so, it should be done on Session 1 only.
Adding a Block Course
When creating a block course, enter the blockettes first, then add the block. In our example, we'll add a Semester 1 Algebra and a Semester 2 Algebra. We'll then add a Block Algebra. The students will request the Block Algebra. When the Scheduler runs, they will be placed in Semester 1 Algebra and Semester 2 Algebra.

Semester 1 Algebra session information:

Semester 2 Algebra session information:
When adding a Blocked course, the Blocked Course Information panel will be active to allow you to select the blockette courses into which your students will be scheduled.

1. The Same Teacher field may be set to No Linking, if you enter Section numbers for each blockette course.
2. Check the Mandatory box to indicate that students must be scheduled into the blockettes. If one of the blockettes is optional, you may leave the Mandatory field unchecked.
3. Click Save.
**Whiteboard**

**Filtering for a Team**

**Scheduling > Courses > Course Sections > Whiteboard**

Whiteboard allows you to view course sections for a selected Team. Only courses matching the Team selected or with no team designation will display.

1. Enter Whiteboard in Quick Search or select Scheduling, Courses, Course Sections, Whiteboard.
2. Select the View tab.
3. Select the House Team to view in the House Team field.
4. Click the Apply button.
Adding a Course

Single Session

Always start with the Course Explorer pane, click on the course you want to add. Then click and drag to the Master Schedule or Sections pane.

1. Enter part of the course code or description in the Course Explorer Search box.
2. When the course appears, click once on it to highlight it.
3. Then click and drag the course to the Master Schedule pane, and release the mouse when you are over the period in which you want to place the course.
4. The pop-up box will then allow you to select a teacher and room.

**Single Session Two Periods**

When a course meets for two periods in a row, select a different End Period in the pop-up.
Multiple Session

When a course meets for multiple periods, but skips a period in between for lunch, you must create two sessions.

First create the initial session. Then right-click on the session and choose Modify Session.
Then choose to add a New Session and click on the Start Period.
The Session Detail page will open. Remember to verify the Marks Are field. If Marks are only issued to one session, they should be issued to session 1.
Adding a Block Course
When creating a block course, enter the blockettes first, then add the block. Block courses have a solid black square next to them in Course Explorer.

Select the block course, then open the Block Sections pane and click on New Block Section:
1. Enter Master Schedule in Quick Search or select Scheduling, Courses, Course Sections, Master Schedule from the menu.
2. Select the additional options drop down from the Search Results panel.
Whiteboard Export
Scheduling > Courses > Course Sections > Whiteboard

1. Enter Whiteboard in Quick Search or select Scheduling, Courses, Course Sections, Whiteboard from the menu.
2. In the Master Schedule pane, right mouse click.
3. Choose to Export to Excel or PDF.
4. Data in Layout will produce a report showing the fields currently visible in the Master Schedule pane. Master Schedule List will produce the same List report available in the Master Schedule page of eSchoolPLUS.
1. Enter Room Availability in Quick Search or select Scheduling, Student Schedules, Pre-Scheduler Reports, Room Availability from the menu.
2. Select your building.
3. Select one or more marking periods to print.
4. In the Filter pane, you may want to search for only active rooms, by selecting Rooms, Room Available, = equals, Yes.
5. Click Run.
1. Enter Seat Availability in Quick Search or select Scheduling, Student Schedules, Pre-Scheduler Reports, Seat Availability from the menu.
2. Select your building.
3. Select a Scheduling Interval of Yearly.
4. Choose your Request Type. Regular Requests will give you counts of how many students have requested the courses as Regular requests. Choose All if you want to include Alternate requests in your counts.
5. To display all courses, leave the Excess Seat and Needed Seat Thresholds at 0.
6. In the Filter pane, you may want to include a search of only active and pre-registered students.
7. Click Run.
1. Enter Teacher Availability in Quick Search or select Scheduling, Student Schedules, Pre-Scheduler Reports, Teacher Availability from the menu.
2. Select your building.
3. Select one or more Marking Periods.
4. You may choose to include teachers who have not been assigned to any courses.
5. If you are including teachers who have not been assigned to any courses, it is especially important to include a filter for Staff Building, Active, = equals, Yes.
6. Click Run.
Class Matrix
Scheduling > Student Schedules > Post-Scheduler Reports > Class Matrix

1. Enter Class Matrix in quick Search or select Scheduling, Student Schedules, Post-Scheduler Reports, Class Matrix from the menu.
2. Select your building.
3. Select one or more marking periods. Note that the report will provide separate pages for each marking period selected.
4. Select one of more grade levels. Courses that match the grade restriction and courses open to any grade level will be included on the report.
5. Click Run.
Locking a Student into a Course Section
Prior to running the Schedule Students option, you may lock students into course sections.

Scheduling > Student Schedules > Student > Schedule Entry

1. Enter the Student Id or name in Quick Search.
2. After the Student Summary page appears, enter Schedule Entry in Quick Search or select Scheduling, Student Schedules, Student, Schedule Entry from the menu.
3. Enter the course and section for the student.
4. After you Keep the student’s schedule, use the Select checkbox and then choose Lock from the additional options drop down.
Scheduling Error Scan
Scheduling > Student Schedules > Student Scheduler > Scheduler Error Scan

1. Enter Scheduler Error Scan in Quick Search or select Scheduling, Student Schedules, Student Scheduler, Scheduler Error Scan from the menu.
2. Select your building.
3. Select an Interval of Yearly.
4. Check to Scan Registration, Scan Student Requests, Scan Master Schedule and Scan Blocked Courses.
5. You may use the Filter pane to limit the Requests scan to only Active and Pre-Registered students.
6. Click Run.

Note that you may want to run the Scan Registration and Scan Student Requests options as part of the request entry process.
1. Enter Schedule Students Parameters in Quick Search or choose Scheduling, Student Schedules, Student Scheduler, Schedule Students Parameters from the menu.
2. Click on the link for your building.
3. Set the prompts as you would like them to default each time you run the Schedule Students option. Note that you may change individual prompts for different scheduling runs, if needed.
4. The value entered in the Maximum Tries field is multiplied by 10,000. Unless you see Timeout messages in your Schedule Students log file, a value of 1 here should be fine.
5. In the Shuffle and Reschedule Attempts fields do not enter a value greater than 5.
6. For a full explanation of each prompt, please refer to the online help.
7. Click Save.
Schedule Students

Scheduling students with the Schedule Students option is a cyclical process. You may run the Schedule Students option, run reports, create a Back-up, erase schedules, make adjustments, and then run Schedule Students again.

Scheduling > Student Schedules > Student Scheduler > Schedule Students

1. Enter Schedule Students in Quick Search or select Scheduling, Student Schedules, Student Scheduler, Schedule Students from the menu.
2. Select your building.
3. The Date Active in Courses should be the first day of school for the new school year.
4. All other prompts will default from your Schedule Students Parameters, but you may change them as needed.
5. The Request Sort Order options determine which requests will be scheduled for a student first.
6. You may want to add a filter for Current Status is in Active and Pre-Registered if Inactive students may still have requests.

7. The Sort panel determines the order in which students will be scheduled. You may choose Demographic fields, such as Grade, or Schedule Status fields, such as Number of Singletons.
8. Click Run.
1. Enter Student Conflict Analysis in Quick Search or select Scheduling, Student Schedules, Post-Scheduler Reports, Student Conflict Analysis from the menu.
2. Select your building.
3. Select a Scheduling Interval of Yearly.
4. Choose the type of requests to include in your analysis.
5. Check the Print Conflicting Courses checkbox to include a listing of unscheduled courses for each student.
6. In the Filter panel, enter Demographic, Current Status, is in, Active and Pre-registered to keep Inactive students out of the process.
7. Click Run.
1. Enter Unscheduled Request Summary in Quick Search or choose Scheduling, Student Schedules, Post-Scheduler Reports, Unscheduled Request Summary from the menu.
2. Select your building.
3. Select a Scheduling Interval of Yearly.
4. Check to include the type of course requests to evaluate.
5. In the Filter panel, enter Demographic, Current Status, is in, Active and Pre-Registered.
6. Click Run.
1. Enter Unscheduled Request Detail in Quick Search or select Scheduling, Student Schedules, Post-Scheduler Reports, Unscheduled Request Detail from the menu.
2. Select your building.
3. Select Yearly as the Scheduling Interval.
4. Check the course request types to include.
5. On the Filter panel enter Demographic, Current Status, is in, Active and Pre-registered.
6. Click Run.
1. Enter Free Period Analysis in Quick Search or select Scheduling, Student Schedules, Post-Scheduler Reports, Free Period Analysis from the menu.
2. Select your building.
3. Select one or more Marking Periods.
4. In the Filter panel, enter Demographic, Current Status, is in, Active and Pre-Registered.
5. Click Run.
Viewing Conflicts in Whiteboard
Scheduling > Courses > Course Sections

On the MS Settings tab, check the Show Unfilled Requests Column, Show Conflicts Sub Row, and Show Availability checkboxes.
The Student Status Pane will display a list of students and whether or not they were scheduled into your selected course/section.
1. Enter Backup/Restore in Quick Search or select Scheduling, Student Schedules, Student Scheduler, Backup/Restore from the menu.
2. Select your building.
4. Enter a descriptive name in the Scheduling Run Label prompt. The date and time of the backup will automatically be recorded for you.
5. Click Run.
Scheduled Course Load/Unload/Lock/Erase

Scheduling > Student Schedules > Student Utilities > Scheduled Course Load/Unload/Lock/Erase

NOTE: The Erase All Action will erase all scheduled courses that are not locked. If you want to make changes to your Master Schedule, you should erase your current schedules and then run the Schedule Students option again.

1. Enter Scheduled Course Load in Quick Search or select Scheduling, Student Schedules, Student Utilities, Scheduled Course Load/Unload/Lock/Erase from the menu.
2. Select your building.
3. Select Erase All in the Action field.
4. After entering your Filter, be sure to Load your student records before choosing Run. The sample filter above assumes we only want to erase schedules for students in grade 11.

5. Click Run.

Note that when you are finished scheduling your students, you may want to run this option choosing Lock as the action. Any subsequent runs of the Schedule Students option will not overwrite Locked courses.
1. Enter Student Schedules in Quick Search or select Scheduling, Student Schedules, Post-Scheduler Reports, Student Schedules from the menu.
2. Select your building.
3. Prior to the start of school, enter your first day of school in the Print as of date prompt. Student courses with a Date Added after this date or Date Dropped before this date will not be included.
4. Leave the Start Date and End Date fields blank to print all students. After school has started you may choose to use these prompts to print only students who have had schedule changes within the dates selected.
5. In the Filter panel enter Demographic, Current Status, is in, Active and Pre-Registered to keep Inactive students out of the report.
6. Enter your sort Selections in the Sort panel. The sample above will print students in alphabetical order by grade level.
7. Click Run.
1. Enter Teacher Schedules in Quick Search or select Scheduling, Student Schedules, Post-Scheduler Reports, Teacher Schedules from the menu.
2. Select your building.
3. Select one or more marking periods.
4. If you select to Print Teachers Without Courses, be sure to enter a filter for Staff Building, Active, = equals, Y-Yes to keep inactive teachers out of the report.
5. Click Run.
1. Enter Teacher Schedule Matrix in Quick Search or select Scheduling, Student Schedules, Post-Scheduler Reports, Teacher Schedule Matrix from the menu.
2. Select your building.
3. Select one or more marking Periods.
4. If you select to Print Teachers Without Courses, be sure to enter a filter for Staff Building, Active, = equals, Y-Yes to keep inactive teachers out of the report.
5. Click Run.
1. Enter Class Lists in Quick Search or select Scheduling, Student Schedules, Post-Scheduler Reports, Class Lists from the menu.
2. Select your building.
3. Select By Section as the Report Type.
4. Select the Marking Periods to include.
5. Select the Periods to include.
6. Choose Today or enter a Selected Date in the Print As Of Date field. Students who enrolled in courses after this date or dropped the course before this date will not be included.
7. Click Run.