Future Scheduling Checklist

This checklist will help you track your progress throughout the scheduling process. Each step in the checklist is followed by one of the terms below.

Term Description

- **Required**: Step must be performed to create a Schedule Master and to schedule students using an automated method.

- **Recommended**: Step should be performed to achieve best results in the scheduling process

- **Perform as Needed**: Data in this area may or may not need to be adjusted from last year's settings or configuration. Change data that needs updating.

- **Optional:** Processes are not required to create a Schedule Master or to schedule students using an automated method.

PART ONE: Preparing to Schedule

Step 1: Update Graduation Years and Grade Levels (Required) RESA   (PS\CA\ST\CF)

Step 2: Maintain Scheduling Setup and Codes (Required)

Check the Status of Clone Utilities RESA   (WS\OF\FS\PS\UT\SC)

Clone the Entity Year and Term Definitions RESA   (WS\OF\FS\PS\UT\CE)

Clone the Calendar Information RESA   (WS\OF\FS\PS\UT\CC)

Clone the Scheduling Master Files RESA   (WS\OF\FS\PS\UT\CS)

Ensure Course Length Sets and Class Control Sets are Accurate   (WS\OF\FS\BC\PS\CO\CL)

Create a course master save point   (WS\OF\FS\BC\UT\PS\SP)

Step 3: Add Students to an Entity (Required)

Run the Mass Add Students to an Entity Utility   (WS\ST\PS\UT\MA)

Remove any Student Enrollment Records entered by mistake   WS\ST\PR)

Step 4: Maintain Staff (Perform as Needed)

Create new Staff Records, if necessary   (WS\OF\SF)

Maintain Staff Entity Record   (WS\SF\SF\Entity)

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Step 5: Verify Scheduling Configuration (Perform as Needed)

Review Scheduling Entity Year Setup   (WS\OF\FS\PS\CF\SE)

  Maximum Semester, Term and Period Values

  Entity Year Options

  Scheduling Options

  Term Definitions

  Course Defaults

Step 6: Maintain the Course Master (Perform as Needed)

Note: At this point you need to add new courses to the Course Master and Delete courses that will no longer be offered in the next school year.

Add, Edit and Delete a Course, Section and Meet   (WS\OF\FS\BC\CM)

Clone a Course in the Course Master

Step 7: Create Scheduling Teams (Optional)

NOTE: Team Scheduling must be enabled in Scheduling Entity Year Setup   (WS/OF/FS/PS/CF/SE)
in Entity Year Options before fields and codes appear for students and course sections.

Add Scheduling Team Codes   (WS\OF\FS\BC\PS\CO\ST)

Update Course and Sections with Scheduling Team Assignments

Assign Students to a Team   (WS\OF\FS\RP\PS\UT\ST)

Modify Individual Student Team Scheduling Assignments   (WS\OF\FS\RP\PS\UT\AS)

PART TWO: Managing Student Requests

Step 1: Create an Availability List (Optional)

Add a Course Wish Group   (WS/OF/FS/RP/PS/CO)

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      Create a Course Availability List   (WS/OF/FS/RP/PS/UT)

      Print a Course Availability List   (WS/OF/FS/RP/RE)

Step 2: Enter Requests (Required) (via MANUAL, STUDENT ACCESS, CAREER CRUISING)

      Add Student Course Requests   (WS/OF/FS/RP/ES)

      Mass Add Student Request   (WS/OF/FS/RE)

Step 3: Turn on Student Access for Course Request Entry by Students (Optional) (WS/FA/FM/PS/CF/EC)

      Course Request

      Edit Available, Selected and Update Selected

      Turn off when Student Entry is complete

Step 4: Use Reports to Analyze Student Requests (Recommended)

      Student Request Report   (WS/OF/FS/RP/RE/SS)

      Course Requests in Course Sequence Report-Tally   (WS/OF/FS/RP/RE/CR)

PART THREE: Building the Scheduling Master

Step 1: Calculate the Number of Sections Needed (Required)

      Run Estimate the Number of Sections   (WS/OF/FS/BC/PS/UT)

      Compare the Estimated Number of Sections and Actual Number of Section Values

Step 2: Estimate the Number of Students in Each Section (Recommended)

      Run the Update Estimated Class Counts by Grade utility   (WS/OF/FS/BM/PS/UT)

Step 3: Create Teacher Schedule Report   (WS/OF/FS/RE/TS)

      The Teacher Schedules Report generates a matrix view by period of a teacher's assigned sections. Set up to run Active only courses & classes with NO page break, formatted Standard by Semester and Landscape.

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Step 4: Learn to Use the Interactive Scheduling Board (Recommended)

Scheduling Using the Interactive Scheduling Board   (WS/OF/FS/BM/SB)

How to Place Sections Using the Interactive Scheduling Board

- Set Ranges
- Set Chip Options
- Set Views
- Save Options

Step 5: Schedule Single-Section Courses into the Schedule Master (Required)

Place Single-Section Courses in the Schedule Master

Make Adjustments to the Course Master

Place Multiple-Section Courses in the Schedule Master

Assign a Co-Requisite to a Course

Assign a Co-Requisite to a Section

PART FOUR: Scheduling Students

Step 1: Manually Place Students in Sections (Optional)   (WS/OF/FS/SS/BS)
Mass Add Students to Classes   (WS/OF/FS/RP/PS/UT)

Step 2: Schedule Student Requests (Required)

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Run the Auto Scheduler in Actual Mode   (WS/OF/FS/SS/AS)

Auto Scheduler setup recommendations:

- Set correct year
- Set grade level desired
- Set Close Section when filled
- Set Build Free Period Matrix
- Force Co-requisites to Schedule All or Nothing (Optional)
- Set for Only flagged Co-requisites (Optional)
- Set Create Student Conflict Detail
- Set Actual Scheduling Run
- Set Number of Runs to 3
- Set Balance by Student Attributes (Optional)

Step 3: Use Reports to Analyze Student Schedules (Recommended)

View Schedule Run Details and Reports   (WS/OF/FS/SS/AS/RA)

Expand the top row of the Available Auto Scheduling Run Records, this is usually the most current run. If you've run multiple runs by grade level be sure to select the correct run.

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Run and interpret the results of the Student Conflict Detail Report

Run and interpret the results of the Course Conflict Report

View Student Schedule Generation Reports

Make adjustments to Course Master

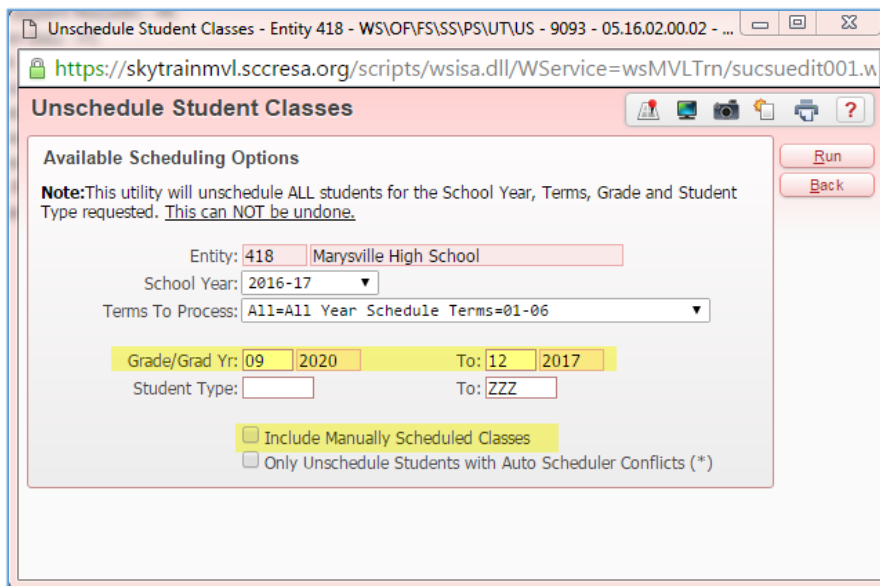Make adjustments to Student Requests

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Step 4: Unschedule Student Classes   (WS/OF/FS/SS/PS/UT/US)

Once the loader results have been analyzed and potential changes made to the Course Master and Course Request you may want to rerun the Auto-Scheduler to obtain the desired results. Before you are able to rerun the Auto-Scheduler you will need to run a utility to **Unschedule Student Classes**.

- Select correct School Year
- Select Term(s) to Unschedule
- Select the Grade or Grades you wish to Unschedule
- **Do NOT select Include Manually Scheduled Classes** (this would unscheduled all manually scheduled Special Ed students, etc…)

Repeat the adjustments, unscheduled and Auto Loader until you have your desired results.

Step 5: Schedule Student Alternate Requests (Optional)- Not recommended

If Alternate Requests were entered, they can be used to resolve conflicts and fill empty periods in a student's schedule. You can use the following methods to process Alternate Requests.

- Review Student Alternate Request Report and schedule Alternate Requests Manually
- Schedule Alternate Requests using the Auto Scheduler

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PART FIVE: Concluding the Scheduling Process

Manually Schedule an Individual Student (Optional)

> By Course
> By Period
> By Subject
> By Teacher
> By Open Classes
> By Class

Use the Walk-In Scheduler to Schedule a Student (Optional)

Note: After Manual Schedule Changes have been made you will need to run a utility to update the Class Counts.

Run Re-synchronize Student Class Counts   (WS/OF/FS/BC/PS/UT/RS)

Run Reports (Recommended)

Class Mailing Labels Report

Class Roster Report

Course/Class Count Report

Student Schedules

Schedule Cards Report

Teacher Schedules Report

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