![ProgressBook StudentInformation logo]

Automatic Marks Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
4/6/21	Entire document	Review & Update
4/14/20	Entire document	Review & Update
5/8/19	Entire document	Updated screenshots

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Automatic Marks will not calculate until the last day of the Reporting Term unless you have set the automatic marks up to calculate early. Setting up an early automatic mark calculation date is covered in Task #4 of this checklist. Example: If you are trying to calculate the Final for All Year courses using Automatic Marks, the Final will not calculate until the last day of school.

Automatic Marks do not automatically calculate when the last day of the term arrives. The Automatic Mark job needs to be kicked off and then the marks will calculate.

Note: If a mark flows into StudentInformation from GradeBook after automatic marks have been kicked off, the user will need to kick off the job again to update automatic marks.

To kick off the Automatic Marks job, edit and save an Automatic Mark Rule, this will kick off the job to calculate the marks.

If you change a student's marks used in the automatic mark calculation, the marks for only that one student will be recalculated. If you want to recalculate the marks for all students kick off the automatic mark job by editing an Automatic Mark Rule.

Task #1 - Configure Marks Maintenance Table

1. Change context to the applicable building and school year.
2. Navigate to : ***StudentInformation*** *»* ***Management*** *»* ***School Administration*** *»* ***Marks Administration Menu*** *»* ***Marks***.
3. Any school using automatic marks should have the ***Average Point Threshold*** column filled out for each mark except those marked as Alternate Marks. The ***Average Point Threshold*** is the lowest value the student can receive to get the mark. For example: on the ***Marks Maintenance*** screenshot following this task, the ***Average Point Threshold*** for a mark of ***C*** is ***1.85***. This means when StudentInformation averages the grades together, the average must be at least 1.85 for the student to get a mark of C.
4. Also, each mark must have a different ***Point Value***. For example: if the school awards A, A-, and A+ each mark must have a different ***Point Value***. The marks can not each have a ***Point Value*** of 4.0. If a student received an A+ for 1st Qtr and an A- for 2nd Qtr, the student could get an A+ for the mark calculated by automatic marks, which logically does not make sense. An A+ and an A- do not average out to be an A+. This is why it is important that each mark have a ***unique Point Value***. F marks have a point value of zero. Marks of I, U, S for example typically have a point value of zero. In order for automatic marks to work properly, the I, U, and S marks should be marked as ***Alternate Marks***.
5. Marking them as ***Alternate Marks*** allows the school to keep the I, U, and S marks with a point value of zero and the marks will not interfere with automatic marks. StudentInformation can not calculate an automatic mark for alternate marks. For example: a student gets an I and an U. Both marks are Alternate Marks. StudentInformation will not be able to calculate the two marks together. The mark you are trying to calculate will need to be manually entered versus being calculated by automatic marks.
6. StudentInformation also cannot calculate an automatic mark for a regular mark and an alternate mark together. For example: a student received a B for 1st Qtr and an I for 2nd Qtr. Since the I is marked as an alternate mark, StudentInformation can not calculate an automatic mark for the two marks together. The mark will need to be hand entered.
7. If the school is a numeric school, the ***Min and Max Numeric Mark*** columns must be filled in. It is very important that there are no gaps in the ***Min and Max Numeric*** columns. If a numeric school has the Marks Maintenance page setup as follows, this is wrong. Notice the gaps in the ***Min and Max Numeric Mark*** values.

		Mark ▲	Mark Name	Description	EMIS Grade	Point Value	Average Point Threshold	Min Numeric Mark	Max Numeric Mark	Credit Multiplier	Is Alt Mark	Is Credit Earned	Is Included in GPA	Is Dq Mark	Active
🗑	✏	A	A	EXCELLENT	A	4.000000	3.990000	95.00	97.00	1.000000	☐	☑	☑	☐	🟢
🗑	✏	A-	A-	EXCELLENT	A	4.000000	3.500000	93.00	94.00	1.000000	☐	☑	☑	☐	🟢
🗑	✏	A+	A+	EXCELLENT	A	4.000000	4.000000	98.00	100.00	1.000000	☐	☑	☑	☐	🟢

8. If a student received a numeric grade of 94.00 for 1st qtr and 95.00 for 2nd qtr, their average would be 94.50. Since there are gaps on the marks

scale and the Min value for an A is 95.00 and the Max value for an A- is 94.00, the student would not receive an average grade since 94.50 is missing from the scale.

9. Now, we are ready to setup the Automatic Mark rules.

Marks Maintenance

From this screen, you can display, add, change and delete data pertaining to marks for the current school year.

Add Mark

		Mark ▲	Mark Name	Description	EMIS Grade	Point Value	Average Point Threshold	Min Numeric Mark	Max Numeric Mark	Credit Multiplier	Is Alt Mark	Is Credit Earned	Is Included in GPA	Is Dq Mark	Active
🗑	✎	A	A	EXCELLENT	A	3.850000	3.850000	94.50	97.49	1.000000	☐	☑	☑	☐	🟢
🗑	✎	A-	A-	EXCELLENT	A	3.500000	3.500000	92.50	94.49	1.000000	☐	☑	☑	☐	🟢
🗑	✎	A+	A+	EXCELLENT	A	4.000000	4.000000	97.50	100.00	1.000000	☐	☑	☑	☐	🟢
🗑	✎	AU	AU	AUDIT		0.000000				1.000000	☑	☐	☐	☐	🟢
🗑	✎	B	B	GOOD	B	2.850000	2.850000	86.50	89.49	1.000000	☐	☑	☑	☐	🟢
🗑	✎	B-	B-	GOOD	B	2.500000	2.500000	84.50	86.49	1.000000	☐	☑	☑	☐	🟢
🗑	✎	B+	B+	GOOD	B	3.000000	3.000000	89.50	92.49	1.000000	☐	☑	☑	☐	🟢
🗑	✎	BLK	BLK	BLANK GRADE		0.000000				0.000000	☑	☐	☐	☐	🟢
🗑	✎	C	C	AVERAGE	C	1.850000	1.850000	78.50	81.49	1.000000	☐	☑	☑	☐	🟢
🗑	✎	C-	C-	AVERAGE	C	1.500000	1.500000	76.50	78.49	1.000000	☐	☑	☑	☐	🟢
🗑	✎	C+	C+	AVERAGE	C	2.000000	2.000000	81.50	84.49	1.000000	☐	☑	☑	☐	🟢
🗑	✎	D	D	POOR	D	0.850000	0.850000	70.50	73.49	1.000000	☐	☑	☑	☐	🟢
🗑	✎	D-	D-	POOR	D	0.500000	0.500000	68.50	70.49	1.000000	☐	☑	☑	☐	🟢
🗑	✎	D+	D+	POOR	D	1.000000	1.000000	73.50	76.49	1.000000	☐	☑	☑	☐	🟢
🗑	✎	EX	EX	Waived		0.000000				0.000000	☑	☐	☐	☐	🟢
🗑	✎	F	F	FAILING	F	0.000000	0.000000	0.00	68.49	1.000000	☐	☐	☑	☐	🟢
🗑	✎	I	I	INCOMPLETE	I	0.000000				1.000000	☑	☐	☐	☐	🟢
🗑	✎	N	N	NO GRADE		0.000000				1.000000	☑	☐	☐	☐	🟢
🗑	✎	P	P	PASS	P	0.000000				1.000000	☑	☑	☐	☐	🟢
🗑	✎	S	S	SATISFACTORY		0.000000				1.000000	☑	☑	☐	☐	🟢
🗑	✎	U	U	UNSATISFACTORY	U	0.000000				1.000000	☑	☐	☐	☐	🟢
🗑	✎	WD	WD	WITHDRAWN	W	0.000000				1.000000	☑	☐	☐	☐	🟢
🗑	✎	WF	WF	WITHDRAWN FAIL		0.000000				1.000000	☑	☐	☐	☐	🟢
🗑	✎	WP	WP	WITHDRAWN PASS		0.000000				1.000000	☑	☐	☐	☐	🟢

☑ Show Active Only

Task #2 - Setting up the Automatic Mark Rules

An Automatic Mark Rule should be setup for each mark the school wants to calculate. If a school has 1st semester and All Year courses, two separate Automatic Mark Rules will need to be setup. One for 1st Semester Average for 1st Semester only classes and one for 1st Semester Average for All Year courses.

Automatic Mark Rules can be setup for a variety of marks. If the school has quarter only classes, an automatic mark rule can be setup to move the quarter grade to the final slot. A separate Automatic Mark Rule would need setup for each quarter. For example: one rule to calculate 1st Qtr only classes, one rule for 2nd Qtr only classes, one rule 3rd Qtr only classes and one rule for 4th Qtr only classes.

.

1. Navigate to : ***StudentInformation*** *» **Management** » **School Administration** » **Marks Administration Menu** » **Automatic Mark Maintenance***.
2. Click **Add Automatic Mark**.
3. Enter a **Code** up to 4 digits.
4. In the example screenshot below, the code is **S1F**.
5. Next, in the **Name** field, enter a descriptive name. State Support suggests using names such as: 1st Sem Only 1st Sem Avg or 1st 9 weeks Only Final.
6. If desired, you can give a more detailed name or enter notes in the **Description** field.
7. In the **Marking Pattern Rule** dropdown, choose the mark you are trying to calculate. In the example screenshot below, I have chosen 1SEM: FIN because I want StudentInformation to calculate the 1st Semester Final for the 1st Semester only classes.
8. Next, choose how you want to handle students missing grades used in the automatic mark calculation in the **Missing Marks Handling** dropdown. If you choose **Ignore Mark,** StudentInformation will not count the missing mark against the student and will base their grade on average of the other grades used in the calculation. If you choose **Ignore Student,** automatic marks will not calculate for any of the student's course section assignments that are missing a mark used in the calculation. If you choose **Use 0,** it is just like giving the student an F for any mark used in the automatic mark calculation and is missing.
9. Click **Save and Enter Details**.

Automatic Mark Maintenance

From this screen, you can display, add, change and delete data pertaining to automatic marks.

Code:* S1F

Name:* 1st Semester Only Final

Description: 1st Semester Only Final

Marking Pattern Rule:* 1SEM: FIN

Missing Marks Handling:* Ignore Mark

[Save] [Save and Enter Details] [Save and New] [Cancel]

10. The page will refresh and now a new button named ***Add Member*** will appear.
11. Click ***Add Member***.
12. In the ***Marking Pattern Rule*** dropdown, choose the mark that will be used in the calculation. In the example screenshot below, it was chosen to calculate 1st Sem Final for 1st Sem Only classes. The school in the example calculates the 1st Sem Final by averaging GP1 at 40%, GP2 at 40%, 1st Exam at 20%. Choose 1SEM: GP1. Be very careful **not** to choose ALYR: GP1, since the final for 1st semester only classes is being calculated, only 1SEM should be chosen for this entry.
13. Next, in the ***Weight*** field, enter ***40*** because the school wants GP1 to account for 40% of the student's grade.
14. Click ***Save and New***.
15. Now, add another member for 2nd GP.
16. Choose 1SEM: GP2 in the ***Marking Pattern Rule*** dropdown.
17. In the ***Weight*** field, enter ***40*** because the school wants GP2 to account for 40% of the student's grade.
18. Click ***Save and New***.
19. Next, choose ***Marking Pattern Rule*** equal to 1SEM: EX1.
20. In the ***Weight*** field, I entered ***20*** and clicked ***Save***.
21. You will receive the following message: ***The automatic mark member was saved successfully.***
22. The three members added are now displayed on the page. Do not be alarmed if the members are not appearing in the order you added them. If a wrong marking pattern rule was chosen, delete the member and add the correct one.
23. Click ***Save*** to kick off the automatic mark job and save your changes.
24. Note: Saving an automatic mark rule kicks off the ***Automatic Mark Cache Rebuild (School Year)*** job on your Management screen.

25. Wait for the job to finish and go the Student Marks page for a student to see if the marks calculated.
26. If the marks did not calculate, see the troubleshooting guide at the end of this checklist.

Automatic Mark Maintenance

From this screen, you can display, add, change and delete data pertaining to automatic marks.

Marking Pattern Rule: * 1SEM: GP1 ▼

Weight: *

1SEM: INT1
1SEM: GP1
1SEM: INT2
1SEM: GP2
1SEM: EX1
1SEM: FIN
2SEM: INT3
2SEM: GP3
2SEM: INT4
2SEM: GP4
2SEM: EX2
2SEM: FIN
ALYR: INT1
ALYR: GP1
ALYR: INT2
ALYR: GP2
ALYR: EX1
ALYR: INT3
ALYR: GP3

Save   Save And N ...

Task #3 - Spot checking students to make sure Automatic Marks are calculating correctly.

1. Navigate to ***StudentInformation*** *»* ***SIS*** *»* ***Student*** *»* ***Marks*** *»* ***Student Marks***.
2. The 1st student is taking a 1st Semester only class – Intermediate Composition.
3. In Intermediate Composition, the student received the following marks:

Course Section	Mark	Value	General	
045 - INTERMEDIATE COMPOSITION: Section 31	GP1	A+		
	GP2	A+		
	EX1	B+		

4. To figure out her final and make sure the automatic mark is calculating the final mark properly, you need to look at the school's ***Marks Maintenance*** table.
5. According to the table, the marks have the following point value:

		Mark	Mark Name	Description	EMIS Grade	Point Value	Average Point Threshold
🗑	✏	A	A	EXCELLENT	A	3.850000	3.850000
🗑	✏	A-	A-	EXCELLENT	A	3.500000	3.500000
🗑	✏	A+	A+	EXCELLENT	A	4.000000	4.000000
🗑	✏	AU	AU	AUDIT		0.000000	
🗑	✏	B	B	GOOD	B	2.850000	2.850000
🗑	✏	B-	B-	GOOD	B	2.500000	2.500000
🗑	✏	B+	B+	GOOD	B	3.000000	3.000000

6. To compute the student's final mark, use the following formula:

   Sum of each (Mark Point Value x Weight) / Sum of Weights

   [(4.0 x 40) / 100] + [(4.0 x 40)/100] + [(3.0 x 20)/100] = Final
      160/100   +   160/100   +   60/100   = Final
        1.60   +   1.60   +   .60   = 3.8

7. The student's final for this course is a 3.8.

8. Next, we need to look at the Marks Maintenance table at the ***Average Point Threshold*** column. The ***Average Point Threshold*** is the minimum point value the student must receive to get the grade. The ***Average Point Threshold*** for an A+ is a 4.0 so the student does not meet the threshold. The ***Average Point Threshold*** for an A is 3.85 so the student does not meet that threshold either. The Average Point Threshold for an A- is 3.50 and the student does meet the threshold for an A-.

Course Section	Mark	Value	General	
045 - INTERMEDIATE COMPOSITION: Section 31	GP1	A+		
	GP2	A+		
	EX1	B+		
	FIN (Auto)	A- (Auto)		

9. Now for the next student, she received the following grades:

Course Section	Mark	Value	General	
045 - INTERMEDIATE COMPOSITION: Section 31	GP1			
	GP2	A+		
	EX1	C+		

10. Since the automatic mark rule was setup to Ignore Missing Marks, StudentInformation will average the 2nd 9 weeks mark and the Exam marks.

$$[(0 \times 40) / 60] + [(4.0 \times 40)/60] + [(2.0 \times 20)/60] = \text{Final}$$

```
   0/60      +    160/60  +   40/60     = Final
    0        +    2.666   +   .666      = 3.332
```

11. The student's final for this course is a 3.332.
12. Next, we need to look at the Marks Maintenance table again at the ***Average Point Threshold*** column. The ***Average Point Threshold*** is the minimum point value the student must receive to get the grade. The ***Average Point Threshold*** for an A+ is a 4.0 so the student does not meet the threshold. The ***Average Point Threshold*** for an A is 3.85 so the student does not meet the threshold for an A. The ***Average Point Threshold*** for an A- is a 3.50 so the student does not meet the threshold for an A-. The ***Average Point Threshold*** for a B+ is a 3.0 so the student does meet the threshold since her average is a 3.332.

Course Section	Mark	Value	General	
045 - INTERMEDIATE COMPOSITION: Section 31	GP1			
	GP2	A+		
	EX1	C+		
	FIN (Auto)	B+ (Auto)		

13. If the Missing Marks Handling was set to **Use 0**, the student would have gotten a C+ for her 1st Semester Final.

[(0 x 40) / 100] + [(4 x 40)/100] + [(2.0 x 20)/100] = Final
    0/100   +   160/100   +   40/100   = Final
      0   +   1.60   +   .40   = 2.00

Course Section	Mark	Value	General	
045 - INTERMEDIATE COMPOSITION: Section 31	GP1			
	GP2	A+		
	EX1	C+		
	FIN (Auto)	C+ (Auto)		

Task #4 - Setting up Automatic Marks to calculate before the last day of the Reporting Term.

1. Navigate to : ***StudentInformation*** *» **Management** » **School Administration** » **Marks Administration Menu** » **Automatic Mark Calculation Dates***.
2. Each physical or locked reporting term will show on the page.

Automatic Mark Calculation Dates

You can view, add, change, and delete automatic mark calculation dates.

[Hide Reporting Terms]

Code	Name	Start	Stop	Mark Cutoff
Qtr1	Quarter 1	08/25/2020	10/23/2020	
Qtr2	Quarter 2	10/26/2020	01/11/2021	
Qtr3	Quarter 3	01/12/2021	03/19/2021	
Qtr4	Quarter 4	03/22/2021	05/21/2021	

ℹ️ To add a calculation date: Select a reporting term, a grade level, and a calculation date, then click Add.
To delete a calculation date: Click 🗑 next to the date you would like to remove.
To edit a calculation date: Select the reporting term and grade level to edit below. Choose a new date and click Add.

Reporting Term:* -- Select Reporting Term -- ⌄ Grade Level:* -- Select Grade Level -- ⌄ Calculation Date:* [   ] 📅 [Add]

3. For Qtr2, the Stop date is 01/11/2021. This means if you want to calculate a mark and you use the Qtr2 mark in the calculation, the marks will not calculate until 01/11/2021. Remember: The marks will not automatically calculate on 01/11/2021. You will have to kick off the job by editing an Automatic Mark Rule.
4. Some schools would like automatic marks to calculate early so teachers can verify grades. The ***Automatic Mark Calculation Dates*** page allows this functionality.
5. In the following example, the school wants the automatic marks to calculate on 01/04/2021 so the teachers have time to verify grades before report cards are printed.
6. In the ***Reporting Term*** dropdown, Qtr2 – Quarter 2 was selected so StudentInformation calculates 1st Semester Final early.
7. In the ***Grade Level*** dropdown, grade 12 - 12 was selected.
8. In the ***Calculation Date*** field 01/04/2021 was selected.
9. Next, I clicked ***Add***.

	Reporting Term	Grade Level	Calculation Date
🗑	Qtr2 - Quarter 2	12 - 12	01/04/2021

10. Since the school wants the 1st Semester Final to calculate early for the entire school, I will need to perform the above steps for each grade level.
11. Another example of when a school might want to calculate grades early is at the end of the school year.
12. Many Elementary schools hand out report cards to the students on the last day. This means the report cards must be printed and ready to go on the last day of school. Since automatic marks do not calculate until the last

day, the school can setup the ***Automatic Mark Calculation Dates*** to make the marks calculate early.

13. An example of when a school would only want a certain grade level to calculate early would be graduating Seniors. Often Seniors end the school year early. The High School could setup an ***Automatic Mark Calculation Date*** for only Seniors. That way the Seniors' grades calculate early, but the other grade levels do not.

Task #5 - Automatic Marks are not calculating. What should I check?

1. First, check to see if it is the last day of the reporting term.
2. If you are trying to get 1st Semester Finals to calculate and the 2nd Qtr is one of the marks used to calculate the 1st Semester Final and 2nd Qtr ends tomorrow, the marks will not calculate until tomorrow.
3. Remember: You kick off the automatic mark job by editing the automatic mark rule and saving. The automatic marks are not going to automatically calculate.
4. If you want the marks to calculate early, setup an Automatic Mark Calculation Date as detailed in Task #4 above.
5. If the marks still are not calculating, verify the physical and virtual reporting terms are in the correct order in Reporting Terms Maintenance. (Qtr 1 is first then 1st Interim then Qtr 2, etc.)
6. If the marks still are not calculating, edit the automatic mark rule and make sure the correct marking pattern rule was chosen. For example: If you are trying to calculate 1st Semester Only classes Final, make sure you chose the marking pattern rule for 1st Semester Only.
7. The ***Automatic Mark Cache Rebuild*** job will be sent to your Management screen. Wait for the job to finish and go to the Student Marks page for a student to see if the marks are now calculating.
8. If the marks still are not calculating, go to the Marks Maintenance page and verify your setups. Please refer to Task #1 in this checklist for detailed automatic mark setup guidelines.
9. If the marks still are not calculating after doing all the above steps, contact your ITC or submit a Help Desk ticket to State Support.

Task #6 - Automatic Marks are calculating, but the marks are incorrect. What should I check?

1. If a student is receiving a B for her final and you know she should have a C, check the **Average Point Threshold** column. Most likely a threshold needs adjusted. Edit the Mark Maintenance table and change the **Average Point Threshold**. Now, edit an automatic mark rule and save to kick off the job. Once the job has finished, go to a Student Marks page to see if the grades are now correct.
2. If the school is a numeric school, also check the Min and Max Numeric Mark Column on the Marks Maintenance page to ensure there are no overlaps. If an A is a 93-100 then you also cannot have a mark S with a min and max value of 93-100. There should be no overlaps on the Min and Max Numeric values.
3. If the marks still are not calculating correctly after doing the above steps, contact your ITC or submit a Help Desk ticket to State Support.