

Batch Scheduler Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
12/16/21	Entire document	2022/2023 updates
05/04/21	Entire document	Review & Update
02/19/21	Task #13	Title update, fix typos
02/01/21	Task #13	Note re: running study hall wizard
12/09/20	Entire document	2021/2022 updates

Table of Contents

Before running the Batch Scheduler.....	3
Task # 1 - Run scheduling reports to verify scheduling data before running the Batch Scheduler	4
Task #2 - Schedule important or special course sections by hand before the Batch Scheduler is run to ensure the student's placement in the courses.	10
Task #3 - Configure Single Student Scheduler (SSS) to schedule individual students on the Requests page.....	15
Task #4 - Configure Batch Scheduler job parameter to schedule the entire school	20
Task # 5 - Run the Batch Scheduler	32
Task # 6 - Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules	34
Task #7 - Make applicable changes and rerun the Batch Scheduler – updating the existing schedule result set	40
Task # 8 – Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules	42
Task #9 – Remove unwanted requests and assignments.	47
Remove unwanted requests and assignments using the Request Assignments page	47
Remove unwanted requests and assignments using the Course Section Assignments page	48
Task # 10 – Rerun Batch Scheduler as many times as needed	49
Task # 11 – Clean up students that are not fully scheduled using the Request page	49
Task # 12 – Clean up students that are not fully scheduled using the Request Assignments page.....	51
Task # 13 – Run Study Hall Wizard to fill in the student's open periods with study halls	55
Task # 14 – Print Schedule Cards (R701).....	62
Appendix A – How to schedule one grade level at a time updating the same scheduler result set each time.....	65
Appendix B – How to run the Batch Scheduler creating a new result set each time	67
Appendix C – How to run the Batch Scheduler for one grade level at a time creating a new result set each time.....	70
Appendix D – How to create multiple master schedules and run the Batch Scheduler for multiple master schedules.....	74
Appendix E – How to clean out assignments made by the Batch Scheduler but leave the manual assignments.....	76

Before running the Batch Scheduler the following steps need to be performed in this order:

1. School Year Initialization: Refer to the ***School Year Initialization Procedural Checklist*** for details.
2. Creating Sub-Calendars: Refer to the ***Calendar NON EMIS or Calendar with EMIS Exceptions Procedural Checklist*** for details.
3. Promoting Students to 22/23 school year: Refer to the ***Student Promotion/Bulk Enrollment Procedural Checklist***.
4. Enter Course Requests in 22/23: Refer to the ***Course Request Procedural Checklist*** and the ***Public Course Request Procedural Checklist***.



Course groups do not have a gender directive. If you give a student a request for a course group, the Batch Scheduler will not honor the gender directives set up on the course sections that comprise the course group.

Note: Course sections in StudentInformation that do not have any students assigned to them still go over to Grade Book. Teachers linked to these course sections (with no students) then need to hide these classes in GradeBook. It is recommended to either inactivate these course sections before turning on the PB Integration or change the teacher on these course sections to someone who does not teach other classes. However, if you choose to inactivate these course sections, the School Year Initialization process will not roll these course sections over to the next year.

Task #1 - Run scheduling reports to verify scheduling data before running the Batch Scheduler

1. Change your context to the building level in the 22/23 school year.
2. After requests have been entered, you can run scheduling reports.
3. The scheduling reports will help you verify requests, determine if you have enough course sections to accommodate the requests, and the course section meeting times are not creating conflicts for key courses. Scheduling reports can be found by navigating to **StudentInformation** >> **SIS** >> **Scheduling** >> **Scheduling Reports**. All the following reports are optional, however it is highly recommended that you run and verify these reports before proceeding. Scheduling reports do not have to be run in order to use the Batch Scheduler, but the reports will help verify students have the proper requests and you have the proper course sections setup to accommodate the requests before you run the Batch Scheduler.
4. Run the **Course Curriculum (CRSE)** report. This report allows you to select up to ten customized fields which will help you verify the course weight, course abbreviations, course names, etc.

TIP #1: Run CRSE report to see if study halls are marked as Course Type = Study Hall so when the Study Hall Wizard is run, the study halls will be assigned properly.

TIP #2: Run CRSE report to see if courses have the correct course priority, demand count, etc.

REPORT: SI - REPO CRSE		HIGH SCHOOL		COURSE CURRICULUM				PAGE 1 OF 5	
SCHOOLYEAR: 2018-2019		RUN AT 2:51 PM 12/6/2018							
COURSE CODE	COURSE NAME	GR	Incld Crdt	Incld GPA	Hon Roll	High Sch Crd	Schd Pri		
122	ART 1	09:10:11:12	Y	Y	Y	Y	2		
133	ART 2	09:10:11:12	Y	Y	Y	Y	2		
144	ART 3	09:10:11:12	Y	Y	Y	Y	2		
155	ART 4	09:10:11:12	Y	Y	Y	Y	2		
201	KEYBOARDING	09:10:11:12	Y	Y	Y	Y	2		
203	BUSINESS APPLICATIONS	09:10:11:12	Y	Y	Y	Y	2		
223	FINANCIAL ACCOUNTING	09:10:11:12	Y	Y	Y	Y	2		
224	ACCOUNTING 2	11:12	Y	Y	Y	Y	2		
299	ENGLISH 9	09:10:11:12	Y	Y	Y	Y	8		
299H	HONORS ENGLISH 9	09	Y	Y	Y	Y	8		

5. Run the **Analytics Hub Course Detail** report to view all fields on a course record with the option to export to excel. Note: The Course Detail report does not return Demand Count.
6. Next, run the **Students with No Requests (NORQ)** report. This report produces a list of students who do not have any requests and therefore will not be scheduled by the Batch Scheduler.

TIP: Run the NORQ report for Active and Non-Resident students to see which students have not put in their requests yet.

REPORT: SI - REPO NORQ		HIGH SCHOOL		STUDENTS WITH NO REQUESTS OR ASSIGNMENTS REPORT				PAGE 1 OF 4	
SCHOOLYEAR: 2018-2019		RUN AT 9:08 AM 12/10/2018							
ID	STUDENT NAME	GN	GR	COUNSELOR	HMRM	HMRM TEACHER			
170089	ADKINS, JERRY	M	09						
152045	AGUILAR, GARY	M	11						
150528	ANDREWS, TOMMY	M	09						
152718	BAKER, MATTIE	F	12						

7. The **Student Course Requests (REQU)** report allows you to print a list of each student's course requests. This report will not tell you if their requests have a Pending status.

Report: REQU		HIGH SCHOOL							
Printed Mon, Dec 10, 2018, 9:05 AM		2018-2019							
Students Course Requests									
Student Number	Student Name	Gd Gr	Counselor	Hmrm Code	Homeroom Teacher	Course Code	Course Name	Sec	Teacher Name
147570	ABBOTT, FRANCISCO	M 09				299	ENGLISH 9	8	JOE STEWART
						451	LIFE EXP	4	LAURA CHANDLER
						299	ENGLISH 9		
						660	PHYS ED		
						422	SPANISH 2	1	GERTRUDE COCHRAN
						122	ART 1	4	JOAN MANNING
						552H	HONORS GEOMETRY	1	JULIE MACK
						749	SOC STUDIES 1	5	WILLIAM BULLOCK
						710	PHYS SCI	4	TERESA THORNTON

8. If you would like a list of students who used the Public Module and their requests have a Pending Status, you can navigate to **Student Information >> Management >> School Administration >> Public Administration >> Uncommitted Requests**. Choose either **Unapproved by Parent/Guardian** or **Uncommitted by Student**. The **Uncommitted Requests** page will give you a list of students whose requests do not have an **Approved** status. If you need to print this page, click **File – Print**.
9. The **Course Request Labels (R206)** can be run to generat student labels to affix to course request sheets.

36522	Hm Rm Bldg: MAHS	36777	Hm Rm Bldg: MAHS	37326	Hm Rm Bldg: MAHS
MONROE, DERRICK		MAYER, PAUL		DYER, JESUS	
Home Room in 2018-2019 :		Home Room in 2018-2019 :		Home Room in 2018-2019 :	
Grade Level in 2018-2019 :	12	Grade Level in 2018-2019 :	12	Grade Level in 2018-2019 :	12
37377	Hm Rm Bldg: MAHS	37383	Hm Rm Bldg: MAHS	37438	Hm Rm Bldg: MAHS
DUFFY, LOUIS		NORMAN, CHAD		EVANS, JASON	
Home Room in 2018-2019 :		Home Room in 2018-2019 :		Home Room in 2018-2019 :	
Grade Level in 2018-2019 :	11	Grade Level in 2018-2019 :	11	Grade Level in 2018-2019 :	12

10. Next, to ensure students have met all pre- and co-requisites for a request, do not have any invalid course requests, or they do not meet the gender or grade requirements of the course, run the **Student Course Request Verification (R401)**. The report will list each student's requests. The report also has the option to only print students with error messages.

REPORT: SI - R401		HIGH SCHOOL		RUN AT 9:12 AM 12/10/201					
SCHOOLYEAR: 2018-2019		STUDENT COURSE REQUESTS VERIFICATION/EDIT REPORT		PAGE 1 OF 88					
STUDENT	COURSE REQUESTS			COURSE REQUESTS					
	ID	COURSE TITLE	PRIORITY	EDIT CODE	ID	COURSE TITLE	PRIORITY	EDIT CODE	
36522	No Requests								
MONROE, DERRICK									
HOME DIST: 049452									
TEL: (419) 555-7984									
GRADE: 12 SEX: M HMRM:									
COUNSELOR:									
DISB COND: **									
36777	304P	ENGLISH 12	8		554	PRE-CALCULUS	8		
MAYER, PAUL	885	COMM/IND CONST ELEC SYSTEMS	8		886	CONSTRUCTION ELEC SYSTEMS	8		
HOME DIST: 049452									
TEL: (419) 555-7500									
GRADE: 12 SEX: M HMRM:									
COUNSELOR:									
DISB COND: **									

The **R401** Error Code Key is as follows:

- a. ALT – Alternate Course ID
- b. INV – Invalid Course ID
- c. SEX – Sex restriction not met
- d. GRD – Grade restriction not met
- e. OTH – Other restrictions to be checked manually
- f. DUP – Duplicate Course Requests
- g. PRQ – Pre-requisites not met
- h. COQ – Co-requisites not met

11. Next, the **Tally of Student Course Requests (R402)** will list each course and the number of students requesting each course.

TIP: You can use this report to ensure the course sections have enough capacity to accommodate all the requests.

REPORT: SI - R402		HIGH SCHOOL		RUN AT 9:15 AM 12/10/2018								
SCHOOLYEAR: 2018-2019		TALLY OF STUDENT COURSE REQUESTS		PAGE 1 OF 5								
COURSE CODE	COURSE NAME	TOTAL	GRADE 09		GRADE 10		GRADE 11		GRADE 12			
			F	M	F	M	F	M	F	M		
122	ART 1	146	76	70	54	52	15	9	4	8	3	1
133	ART 2	50	25	25	0	1	14	11	6	3	5	10
144	ART 3	18	9	9					3	7	6	2
155	ART 4	7	3	4							3	4
201	KEYBOARDING	34	12	22	4	12	5	3	0	3	3	4
203	BUS APPLICATION	59	25	34	14	22	5	5	5	6	1	1
223	FIN ACCOUNTING	22	11	11					7	8	4	3
299	ENGLISH 9	162	73	89	72	87			0	1	1	1
299H	HONORS ENG 9	57	42	15	42	15						

12. The **Potential Course Conflicts Matrix (R403)** report can be used to generate a matrix listing of each course ID against all other course IDs in order to determine the number of conflicts that would result if two courses were offered only one time (singleton) within the same block/period of the day. The forecasted number of conflicts will be printed at the intersection point of the matrix corresponding to each pair of courses.

TIP: You can use the report to analyze requests to determine how many sections of a course are needed, and if the requests create any time conflicts.

REPORT: SI - R403		HIGH SCHOOL		RUN AT 9:16 AM 12/10/2018																													
SCHOOLYEAR: 2018-2019		POTENTIAL COURSE CONFLICTS MATRIX		PAGE 1.1 OF 9																													
COURSE		122	133	144	155	201	203	223	299H	302	302H	303	303H	304	304P	305	306	306	306	394	395	399	400	421	422	423	424	424	425	451	452	454	
122	ART 1	ART	146	0	0	0	3	13	0	68	26	16	5	9	1	2	1	1	0	12	0	0	0	0	0	26	40	5	3	0	40	34	9
133	ART 2	ART	0	50	0	0	2	2	2	1	0	22	3	8	1	8	6	0	1	2	0	0	1	0	4	7	3	1	0	1	2	8	
144	ART 3	ART	0	0	18	0	1	0	2	0	0	0	0	6	1	3	2	0	0	1	0	0	1	0	0	2	0	2	0	0	0	0	
155	ART 4	ART	0	0	0	7	0	0	0	0	0	0	0	0	0	0	0	0	1	6	0	0	1	0	0	0	0	0	0	0	0	0	0
201	KEYBOARDING	BUS	3	2	1	0	34	8	1	12	2	8	0	3	0	3	1	0	0	1	0	0	0	0	0	6	3	4	0	0	3	3	3
203	BUS APPLICATION	BUS	13	2	0	0	8	59	2	25	7	9	0	9	2	1	0	0	0	3	0	0	3	0	10	9	2	0	0	7	6	6	
223	FIN ACCOUNTING	BUS	0	2	2	0	1	2	21	0	0	0	0	11	1	2	2	0	1	2	0	0	1	0	0	1	0	2	0	0	0	0	
299	ENGLISH 9	ENG	68	1	0	0	12	25	0	161	0	0	0	1	0	1	1	0	0	14	0	0	0	0	49	41	0	1	0	58	50	0	

13. The **Student Who Requested A Specific Course (R404)** report allows the user to receive a list of students that have requested a specific course. The report also has the ability to list the courses that have less than a specified number of requests.

REPORT: SI - R404		HIGH SCHOOL		RUN AT 9:21 AM 12/10/2018							
SCHOOLYEAR: 2018-2019		STUDENT WHO REQUESTED A SPECIFIC COURSE		PAGE 1 OF 1							
COURSE		HONORS CHEMISTRY									
ALTERNATE	ID	STUDENT NAME	COUNSELOR	TEAM	GN	ST	GR	HMRM	HOME DISTRICT	DIS	TELEPHONE
	540	119979	CORTEZ, PAUL		M	A	10		MA	**	(419) 555-4156
		151827	WITT, ALAN		M	A	10		MA	**	(419) 555-5334
		38194	ABBOTT, MICHAEL		M	A	11		MA	**	(419) 555-4747

14. The **Students Requesting A Specific Course Pair (R405)** report a produces a list of students that have requested a specific pair of courses. Once you have determined which courses are singletons by running either the R403 or R406 report, you can run the R405 report to see which students will actually have a conflict if the meeting times on the two courses are left the same (singleton).

ALTERNATE		ID	STUDENT NAME	GR	GN	HMRM	HOME DISTRICT	DISB COND	TELEPHONE
1	2	38194	ABBOTT, MICHAEL	11		M	049452	**	(419) 555-4747
		148072	ALBERT, GEORGE	11		M	049452	**	(419) 555-3641
		149488	DAVID, YVONNE	11		F	049452	**	(419) 555-7549
		39526	DUNN, SANDRA	11		F	049452	**	(419) 555-7883

15. The **Potential Course Conflicts (R406)** report is used to generate a table listing each course ID against all other course IDs that have been jointly requested by one or more students, in order to determine that number of conflicts that would result if the two courses were offered only one time (singleton) within the same block/period. Optionally, this report can be based on only those courses where the number of students requesting the course is less than or equal to the number specified on the report submission screen.

No	Id	Course Name	No	Id	Course Name	No	Id	Course Name	No	Id	Course Name
2	122	ART 1	6	133	ART 2	2	144	ART 3	3	155	ART 4
1	201	KEYBOARDING	2	203	BUS APPLICATION	5	223	FIN ACCOUNTING	20	303	ENGLISH 11
4	303H	HONORS ENG 11	2	303I	ENGLISH 11	8	304	ENGLISH 12	26	304P	ENGLISH 12

16. Next, the **Course Request Verification Slip (R416)** report can be run to create verification slips to pass out to students so they can verify their course requests for accuracy. The report has the option to print one student per page and also has the option to print the student's current schedule in 21/22 and their requests for 22/23.

REQUESTED COURSE	COURSE NAME	SEC	CURRENT YR - TRM	COURSE CODE - NAME	SEC	RP	MRK	MRK TYPE
302	ENGLISH 10	3						
421	SPANISH 1	2						
500	MANUFACTURING OPERATIONS 1	4						
540	COMPUTER SCIENCE ESSENTIALS	3						
552	GEOMETRY	1						
650	HEALTH	2						
713H	HONORS BIOLOGY	1						
751	SOCIAL STUDIES 2	5						

17. The **Location Schedule (R409)** report generates a schedule for one or all locations/rooms, indicating the courses that are scheduled within a specified time period in that location. Additionally, it is used to confirm that the class master schedule doesn't contain any location/room conflicts.

Report: R409
Printed Mon, Dec 10, 2018, 9:27 AM

HIGH SCHOOL
2018-2019
Location Schedule

Period	Rotation Days	Course Code	Course Short Name	Sec Num	Staff Code	Staff Name	Conflict	Schedule Terms				
								08/16/2018	10/22/2018	01/07/2019	03/18/2019	
Location Code 100 Name: CLASSROOM												
1	MTWRF	302	ENGLISH 10	10	MC000001	CHERYL AGUILAR		X				
2	MTWRF								Open	Open	Open	Open
1	MTWRF	614	MUSIC THEORY	1	147	FELICIA OLSEN		X	X	X	X	X
3	MTWRF	612	CHOIR 9	1	147	FELICIA OLSEN		X	X	X	X	X
4	MTWRF	615	WOMEN'S CHORUS	1	147	FELICIA OLSEN		X	X	X	X	X
5	MTWRF	613	CONCERT CHOIR	1	147	FELICIA OLSEN		X	X	X	X	X
5A	MTWRF								Open	Open	Open	Open
5B	MTWRF								Open	Open	Open	Open
5C	MTWRF								Open	Open	Open	Open
6	MTWRF	612	CHOIR 9	2	147	FELICIA OLSEN		X	X	X	X	X
7	MTWRF								Open	Open	Open	Open
8	MTWRF								Open	Open	Open	Open
NS	MTWRF								Open	Open	Open	Open
NC	MTWRF								Open	Open	Open	Open
CCP	MTWRF	CCP1101	AGRISCIENCE	97	250	PETER STEPHENSON	Conflict	C	C			
CCP	MTWRF	CCP1103	MICROBIO	97	250	PETER STEPHENSON	Conflict	C	C			

18. The **Teacher Schedule (R411)** report is used to generate a schedule for one or all teachers. The report indicates the courses they are scheduled to teach within a specified time period. Additionally, the report is used to confirm that the class master schedule does not contain any teacher conflicts.

Report: R411
Printed Mon, Dec 10, 2018, 9:34 AM

HIGH SCHOOL
2018-2019
Teacher Schedule

Period	Rotation Days	Course Code	Course Short Name	Sec Num	Location	Filling Male	Filling Female	Filling Total	Schedule Terms			
									08/16/2018	10/22/2018	01/07/2019	03/18/2019
Teacher Code: MC000001 Name: CHERYL AGUILAR												
1	MTWRF	302	ENGLISH 10	10	CLASSROOM				X			
1	MTWRF									Open	Open	Open
2	MTWRF									Open	Open	Open
3	MTWRF									Open	Open	Open
4	MTWRF									Open	Open	Open

19. The **Singleton List Report (R813-A)** report prints out courses that only exist in one period during the day. This allows the user to see which courses will be in conflict with each other if they are only offered once.

REPORT: 81 - R813-A

HIGH SCHOOL

SINGLETON COURSE LIST

PAGE 1 OF 3

SCHOOLYEAR: 2018-2019

PERIOD	2	3	4	5	5A	5B	5C	6	7	8	NO	NO
9973	9993	878	9822	9961				844	766	874		
9842	9994	9951	9981	856				623	621	810		
9844	970	9952	841TR	613				898	9862	858		
859	884	9832	9882	930				951	9861	886		

20. Finally, to verify you have the needed courses, course sections, meeting times and capacities setup, run the **Class Master Schedule (R407)** report. The demand count on the R407 is the number of students who have a request for a course that has not been fulfilled yet.

Report: R407		HIGH SCHOOL	
Printed Mon, Dec 10, 2018, 9:35 AM		2018-2019	
Class Master Schedule			
Group: (none)	(none)	Gr Cap:	Demand:
Course: 122		ART 1	Credits: 1.000
		Dpt: ART	Demand: 13
Sec Term	Day/Period/Location/Staff		Cap M F Tot Open
1 FULL	MTWRF / 1 / 151	JOAN MANNING	22 8 11 19 3
2 FULL	MTWRF / 2 / 151	JOAN MANNING	22 8 12 20 2
3 FULL	MTWRF / 6 / 151	JOAN MANNING	22 4 11 15 7
4 FULL	MTWRF / 4 / 151	JOAN MANNING	22 9 13 22 0
5 FULL	MTWRF / 5 / 151	JOAN MANNING	22 8 13 21 1
6 FULL	MTWRF / 8 / 151	JOAN MANNING	22 13 7 20 2
7 FULL	MTWRF / 3 / 132	JAMES DURAN	25 15 6 21 4
96 FULL	MTWRF / ALT / 107	LEO BERRY	0 3 0 3 -3
98 FULL	MTWRF / HBT / NS	LEO BERRY	0 0 0 0 0
Totals:			157 68 73 141 16

21. Edit the Master Schedule by navigating to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Initialization** » **Master Schedule**. Click on the blue links to edit course sections, course groups, or courses. The Master Schedule contains all class meeting information that corresponds to each course and course group that is offered for a selected school year. A building may have multiple Master Schedules defined. One example of why a school would want multiple Master Schedules is if they have a levy on the ballot and they are not sure if it will pass or not. One Master Schedule would include all course section assignments if they levy passed and other Master Schedule would not include the course sections they would have to discontinue using if they had to lay off teachers because the levy failed. State Support recommends keeping it simple the first couple of years and using only one Master Schedule. Once the school is familiar with how StudentInformation scheduling works and feels more comfortable with the process, they can use multiple Master Schedules. If the school decides to use multiple Master Schedules, please keep in mind that only one Master Schedule Result Set can be chosen as the finalized schedule.
22. Review and update course sections and course section meeting times by navigating directly to the course sections page **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Course Maintenance** » **Course Sections**.
23. Review and update course groups by navigating directly to the course groups page **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Course Maintenance** » **Course Groups**.
24. Review and update the courses by navigating directly to the courses page **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Course Maintenance** » **Courses**.
25. Once you have run all the necessary reports and made changes to the Master Schedule, the Batch Scheduler can be run.

Task #2 - Schedule important or special course sections by hand before the Batch Scheduler is run to ensure the student's placement in the courses

1. Occasionally, a student needs to have a certain course a certain period as a top priority.
2. State Support recommends scheduling those course sections by hand before the Batch Scheduler is run so the rest of the student's schedule can be built around those important courses.
3. Example: A student has to take PSO Comp in 22/23. The course is only offered 9th period but other key courses she has requested such as Geometry and Biology are also offered 9th period. The school would want to manually schedule her into 9th period PSO Comp by using the **Course Section Assignments** page or **Request Assignments** page and then let the Batch Scheduler fulfill her requests for Geometry and Biology for another period besides 9th period.
4. To add a manual assignment using the **Course Section Assignments** page navigate to **StudentInformation** » **SIS** » **Scheduling** » **Course Section Assignments**.
5. Put a student in context.
6. Select a master schedule from the **Schedule** dropdown.
7. Next, select a schedule result set from the **Schedule Result** dropdown.
8. The Schedule Result should have been created as a part of the **School Year Initialization Procedural Checklist**.
9. If you already have a Result Set in the dropdown skip to #10.
 - a. If the dropdown is empty navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Scheduler** » **Schedule Result Sets** to create a Schedule Result Set.
 - b. On the **Schedule Result Sets** page in the **Filter By Schedule** dropdown choose a Master Schedule. Typically there is only one schedule in the dropdown.
 - c. Click **Add Schedule Result**.
 - d. Enter a name in the **Name** field. SI State Support recommends naming it **Default Schedule Result**.
 - e. Click **Save**.
10. Once you have selected a schedule and schedule result set we are ready to add assignments.
 - a. Click **Add Course Assignment**.
 - b. The page refreshes.
 - c. In the **Course/Section** fields enter the course and section number.
 - d. If you don't know the course and or section number use the **Ellipse** icon.
 - e. If you clicked on the **Ellipse** icon a new window pops up that shows each section of the course and the capacity and filling count.

- f. Click on the blue link for the section number 10 and the section number will be automatically filled in for you.

Non-Groups or Groups: Non-Groups Groups

Course Code: Course Type:

Name:

Department: EMIS Subject Code:

Area of Study: Course Subject Area:

Teacher: Honors Only

Rotation Day: Period of the Day:

Course Code - Name	Department	Course Sections				
2300 - US STUDIES	SOCIAL STUDIES	Section Term	Teacher(s)	Meeting Time	Capacity/Filling	
		10	All Paul Jones	01 (239)	30	0.00
		50	All Paul Jones	05 (239)	25	0.00

- g. The **Assignment Start Date** field defaults to the first day of school.
- h. If the course section is associated with a course term that starts after the current date the **Start Date** will default to the first day of that course term.

Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Schedule Result Set: Default Schedule Result Student: ACEVEDO, BILL

Course/Section:

Assignment Start Date: *

Assignment Stop Date:

Leave the **Assignment Stop Date** field empty.

- i. Click **Save**.
- j. The page refreshes and the following message is displayed, **The Course Section Assignments was marked to be saved. Click the save changes button to commit to the database.**
- k. Click **Save Changes** again to commit the changes to the database.
- l. If click **Save Changes** isn't clicked the course section will not be assigned.
- m. The page refreshes.
- n. Another item to note is the **Type** says **Manual**. This means the course section assignment was added by hand by the office staff versus being scheduled by the Batch Scheduler. (Assignments made by the Batch Scheduler have a **Type** of **Batch**.)

11. The manual assignment will not show on the **Requests** page (see screen shot below) because the assignment didn't originate from a request. The **Requests** page only shows requests.

Student Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

12. Manual assignments may also be added on the **Request Assignments** page.

13. Navigate to **Student Information » SIS » Student » Student Schedule » Request Assignments**.
- Select a **Working Schedule** and **Result** from the dropdowns.
 - Click **Reload Screen**.
 - Click **Add Assignment**.
 - The right side of the screen refreshes.

Student Requests & Assignments - DAILY, DANIEL

From this screen you can manage a student's requests and course section assignments

- In the **Choose Course or Course Section** fields enter the course section number or use the **Ellipse** icon to select the course section.
- Click **Next** or hit the **Tab** key on the keyboard.
- All sections of the course will appear.

- h. Click the **Assign** button of the section you would like to assign to the student.

Student Requests & Assignments - DAILY, DANIEL
 From this screen you can manage a student's requests and course section assignments

Working Schedule: Default Schedule Result: Default Schedule Result Reload Screen

View Display Options | Close Assignments | View Schedule Graph

Request		Assignment				
Primary	Alt.	Course	Sec	Start	Drop	
1560		1560	12	1/15/2018		
1360		1360	20	8/21/2017		
5210		5210	21	8/21/2017		
8710		8710	21	8/21/2017		
3360		3360	30	8/21/2017		
2420		2420	50	8/21/2017		

Course Group Group Section Show Active Only

Click assigned course for details

Run Scheduler Schedule Study Halls **Add Request** **Add Assignment**

Add Assignment

Choose Course/Group (required) and section (optional):

1140

Action	Course/Group	Sec	Meeting Times	Term	Filling
Assign	1140	20	02 (154)	All Year Course	0.00 / 30
Assign	1140	30	03 (154)	All Year Course	0.00 / 25
Assign	1140	40	04 (154)	All Year Course	0.00 / 25

Edit Assignment Course Section Details Scheduling Conflict Filled

Next > Cancel

- i. The right side of the screen refreshes again.
- j. The **Course/Section** fields are grayed out – which is correct since we selected which section we wanted by clicking Assign in the previous step.
- k. If you selected the wrong course section click **Cancel**.
- l. The **Assignment Start Date** field always defaults to the first day of the course term.
- m. Click **Save Assignment**.

Student Requests & Assignments - DAILY, DANIEL
 From this screen you can manage a student's requests and course section assignments

Working Schedule: Default Schedule Result:

Assignment Added

Request		Assignment				
Primary	Alt.	Course	Sec	Start	Drop	
1560		1560	12	1/15/2018		
1360		1360	20	8/21/2017		
5210		5210	21	8/21/2017		
8710		8710	21	8/21/2017		
		2520	22	1/15/2018		
3360		3360	30	8/21/2017		
		1140	40	8/21/2017		
2420		2420	50	8/21/2017		

Course Group Group Section Show Active Only

Click assigned course for details

Run Scheduler Schedule Study Halls **Add Request** **Add Assignment**

- n. Notice there is no corresponding request on the same line for this course section assignment. This means the course was entered manually and didn't originate from a request.



If you add a manual assignment to a student using the Course Section Assignments, Request Assignments, or Bulk Assign please make sure you inactivate any request they have for the course (if it doesn't appear on the same line on the Request Assignments page. If the request isn't inactivated before the Batch Scheduler runs the Batch Scheduler will attempt to fulfill the outstanding request and the student could end up with two assignments for the same course.

Task #3 - Configure Single Student Scheduler (SSS) to schedule individual students on the Requests page

1. Navigate to [StudentInformation](#) » [Management](#) » [School Administration](#) » [Scheduling Administration](#) » [Scheduler](#) » [Job Parameter Sets](#).
2. If your school was live on SI last year all the job parameter sets from 21/22 copied up to 22/23. SI State Support recommends deleting all unwanted job parameter sets that copied up from 21/22 so there will no confusion as to which job parameter you are using this year.
3. Click **Add Job Parameter Set**.
4. You will be brought to the first tab of the **Schedule Job Wizard** page named **Run Level Parameters**.
 - a. In the **Grade Levels to Schedule** filter pull over all grade levels to the right.
 - b. In the **Course Terms to Schedule** filter pull over all course terms to the right.
 - c. In the **Sort Criteria for Student who are being Scheduled** filter it doesn't matter what is selected since the SSS only schedules one student at a time.
 - d. In the following screenshot I have chosen **Student Random**.
 - e. The **Section Overfilled Percent** field will be filled out according to your school's policy on overfilling. Some schools allow no overfilling and others allow five or ten percent or even more.

Note: If your school does not allow section overfilling, enter 0. If left blank, the scheduler will not complete.
 - f. Example: If a course had a capacity of 20 and the **Section Overfilled Percent** was set to five percent that means the SSS would overfill the course section by one student. (5% of 20 = 1)
 - g. Next, in the **Course Group Locking** dropdown choose either **Lock No Course Groups** which means that if a student has a request for a course that is part of a group but doesn't have a separate request for the group, the SSS will attempt to schedule the student into the course even if the course group is marked as **Is Locked** on the Course Group Maintenance page.
 - h. If **Honor Course Group Locks** is chosen, then the SSS will look at the course setup. If the group is locked and a student has a request for a course that is part of the group the SSS will not schedule the student in the course because the group is locked.
 - i. If **Lock All Course Groups** is chosen, the SSS will not attempt to schedule any individual requests for a course that is part of a group even if the group isn't locked.
 - j. In the **Balance By Ethnicity** choose **No Balancing** or an ethnicity filter.

- k. If an ethnicity filter is chosen from the dropdown the Batch Scheduler will attempt to schedule 50% of the ethnicity chosen and then the remaining 50% will be comprised of all other ethnicities not chosen.
- l. Example: If **H-Hispanic** is chosen the **Balance By Ethnicity** dropdown the Batch Scheduler will attempt to schedule each course section with 50% Hispanic students and the other 50% of students a mix of the remaining ethnicities that weren't chosen.
- m. The **Time Limit Per Student** filter determines the maximum number of seconds that the scheduler will try to schedule each student.
- n. In the following screenshot I have chosen **60** seconds per student.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

The screenshot shows the 'Schedule Job Wizard' interface with several tabs: 'Run Level Parameters', 'Pass Level Parameters', 'Pass Control', 'Course Sequencing Rules', 'Teacher Link Groups', and 'Submit'. The 'Run Level Parameters' tab is active. It contains the following sections:

- Grade Levels to Schedule:** A list of grade levels (05-05, 06-06, 07-07, 08-08) on the left and (09-09, 10-10, 11-11, 12-12) on the right, with arrows indicating selection.
- Course Terms to Schedule:** A list of course terms (1st Semester Course, 2nd Semester Course, All Year Course) on the right, with arrows indicating selection.
- Sort Criteria for Students who are being Scheduled:** A list of criteria (Student Number DESC, Student Schedule Priority, Student Requesting Group, Grade Level DESC) on the left and 'Student Random' on the right, with arrows indicating selection.
- Section Overfilled Percent:** A dropdown menu set to '5'.
- Course Group Locking:** A dropdown menu set to 'Lock No Course Groups'.
- Balance By Ethnicity:** A dropdown menu set to 'No Balancing'.
- Time Limit Per Student:** A dropdown menu set to '60'.

There are two informational notes: one about sort criteria being applied from top to bottom, and another about the Time Limit Per Student value determining the maximum number of seconds for scheduling each student. A 'Next >' button is located at the bottom left.

- 5. Click **Next** to move to the 2nd tab named **Pass Level Parameters**.
 - a. In the **Maximum Number of Passes** dropdown choose **1**.
 - b. The SSS only needs to make one pass.
 - c. The **Maximum Number of Periods Per Day** filter typically defaults to the number of periods found on the **Periods of the Day Maintenance** page.
 - d. If you want to make sure there is room for study halls you may want to use a number that is lower than the actual number of periods for the school.
 - e. Example: Your school has 10 periods in each day. You can type in 8 in the **Maximum Number of Periods Per Day** field so that you still have 2 open periods.
 - f. The other four items on the tab will be explained in greater detail in Task #4 when you setup the job parameter for the Batch Scheduler.
 - g. In general the other options aren't used by the SSS scheduler so leave them blank.

h. The following screenshot is an example of the **Pass Level Parameters** tab for SSS.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

6. Click **Next** to move the 3rd tab named **Pass Control**.
 - a. On the **Pass Control** tab place a check in the box next to **#9 Allow Partial Schedules**.
 - b. If the **Section Overfill Percent** was filled out on tab 1 make sure to a check in the box in **#7 Allow Section Overfilling**.
 - c. If **#7 Allow Section Overfilling** wasn't checked the SSS wouldn't overfill even though 5% overfilling entered on tab #1.
 - d. The other options typically aren't used when running the SSS and will be explained in detail in Task #4 when we setup the job parameter for the Batch Scheduler.
 - e. If your school wishes to use some of the other options you can go back and edit the SSS job parameter at anytime and select them.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

#	Description	1
1.	Enforce Course Sequencing Rules	<input type="checkbox"/>
2.	Enforce Daily Pattern Rules	<input type="checkbox"/>
3.	Enforce Teacher Link Groups	<input type="checkbox"/>
4.	Enforce Maximum Number of Periods Per Day	<input type="checkbox"/>
5.	Enforce Number of Courses Between Schedule Terms	<input type="checkbox"/>
6.	Enforce Course Weights Between Schedule Terms	<input type="checkbox"/>
7.	Allow Section Overfilling	<input checked="" type="checkbox"/>
8.	Try Alternates	<input type="checkbox"/>
9.	Allow Partial Schedules	<input checked="" type="checkbox"/>
10.	Order Requests By Priority	<input type="checkbox"/>
11.	Enforce Requests with Assigned Teacher or Period	<input type="checkbox"/>

7. Click **Next** to move the 4th tab named **Course Sequencing Rules**.
 - a. Typically, the SSS isn't set up with course sequencing rules.
 - b. The **Course Sequencing** tab will be explained in detail in Task #4 when we setup the job parameter for the Batch Scheduler.
 - c. If your school wishes to use **Course Sequencing Rules** tab you can edit the SSS job parameter at anytime and set them up.
8. Click **Next** to move to the 5th tab named **Teacher Link Groups**.
 - a. Typically the SSS isn't set up with **Teacher Link Groups**.
 - b. The **Teacher Link Groups** tab will be explained in detail in Task #4 when we set up the job parameter for the Batch Scheduler.
 - c. If your school wishes to use **Teacher Link Groups** tab you can edit the SSS job parameter at anytime and set them up.
9. Click **Next** to move to the 6th and final tab named **Submit**.
 - a. In the **Job Parameter Set Name** field enter **Single Student Scheduler**.
 - b. The **Job Parameter Set Description** field is optional.
 - c. Put a check in the box next to **Set this Parameter Set as the Single Student Parameter Set**.
 - d. Once you put in the checkbox the page refreshes and now there is another option named **Allow Partial Schedules for the Single Student Parameter Set**.
 - e. Place a checkbox in this option also.
 - f. Caution – do not check the other box next to **Set this Parameter Set as the Default Batch Parameter Set**. A separate parameter set must be setup for the Batch Scheduler. We will do that in Task #4 when we set up the parameter for the Batch Scheduler.
 - g. The next option named **Clear Schedule Result Created by the Scheduler**, if checked, the option will undo all course section assignments previously scheduled by the Batch Scheduler or all course section assignments scheduled in prior runs of the SSS and attempt to reschedule the student into the course sections.
 - h. If the other option, **Clear Schedule Results Created Manually**, is checked, the SSS will undo any course sections assignments that originated from a request and were assigned manually and attempt to reschedule them.

- i. Typically neither option is checked when running the SSS.
Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit

Is Active:

Job Parameter Set Name:*

Job Parameter Set Description:

Set this Parameter Set as the Default Batch Parameter Set

Set this Parameter Set as the Single Student Parameter Set

Allow Partial Schedules for the Single Student Parameter Set

i If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests by one or more previous scheduler runs. It will then attempt to reschedule the associated Requests.

Clear Schedule Results Created By Scheduler

i If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests manually. It will then attempt to reschedule the associated Requests.

Clear Schedule Results Created Manually

Save Schedule Parameters | < Back

- j. Click **Save Schedule Parameters**.
10. Once the page refreshes, you are brought back to the **Job Parameter Set Maintenance** page.
11. The Single Student Scheduler can be run on the Student Requests page (**Student Information » SIS » Scheduling » Requests**) and on the Request Assignments page (**Student Information > SIS > Student > Student Schedule > Request Assignments**)
- a. The Single Student Scheduler is typically run when new students arrive in the district after the Batch Scheduler has already been run.
12. Now, we are ready to setup the Batch Scheduler job parameter set.

Task #4 - Configure Batch Scheduler job parameter to schedule the entire school

1. The Batch Scheduler can be run for one grade level at a time or the entire school.
2. In this task we will setup the Batch Scheduler to run for the entire school.
3. If you would like to run the Batch Scheduler one grade level at a time select one grade level in the filter and run the Batch Scheduler. Run reports to resolve conflicts and then run the scheduler again with the same grade level selected until the desired results are achieved. Now edit the parameter set and pull a new grade level over to the right and remove the other grade level from the filter. Run the Batch Scheduler and resolve conflicts. Repeat this process for the remaining grade levels.
4. Navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Scheduler** » **Job Parameter Sets**.
5. Click **Add Job Parameter Set**.
6. You will be brought to the first tab of the **Schedule Job Wizard** page named **Run Level Parameters**.
 - a. In the **Grade Levels to Schedule** filter pull over all grade levels to the right.
 - b. In the **Course Terms to Schedule** filter pull over all course terms to the right.
 - c. The next section is named the **Sort Criteria for Students who are being Scheduled**.
 - d. Multiple sort criteria can be pulled over to the right but the sort criteria is applied in order from top to bottom.
 - e. If **Grade Level ASC** is chosen SI will attempt to schedule the lowest grade level first.
 - f. If **Grade Level DESC** is chosen SI will attempt to schedule the highest grade level first.
 - g. In other words if you want the scheduler to schedule 12th graders before scheduling the other grade levels choose **Grade Level DESC**.
 - h. If it doesn't matter which grade level gets scheduled first choose **Student Random**.
 - i. Do not select both **Grade Level ASC** and **Grade Level DESC**.
 - j. If **Student Name ASC** is chosen students with last names starting with A are scheduled before students with last names that begin with B.
 - k. If **Student Name DESC** is chosen students with last names starting with W are scheduled before students with last names that begin with T for example.
 - l. If it doesn't matter which students are scheduled first choose **Student Random**.

- m. If **Student Number ASC** is chosen students with the lowest student numbers will be scheduled first.
- n. Example: student #10029 will be scheduled before student #10041.
- o. If **Student Number DESC** is chosen students with the highest student numbers will be scheduled first.
- p. If it doesn't matter which students are scheduled first choose **Student Random**.
- q. If **Student Schedule Priority** is chosen the Batch Scheduler will look the **Scheduling Priority** field on the Additional tab of each student's profile.
- r. The **Scheduling Priority** field defaults to 5 upon registration and isn't a field that is commonly used in SI. Scheduling Priority is only used when running the Batch Scheduler or Study Hall Wizard.
- s. **Scheduling Priority** is not the same as **Course Priority**. Course Priority will be discussed later in this task.
- t. Most schools will not choose to schedule by **Scheduling Priority**.
- u. If your school does choose to schedule by **Scheduling Priority** you can use **SIS Student Search** to create a list of each student's scheduling priority.
- v. Navigate to **StudentInformation » EZ Query » Reports » SIS Student Search** to create the list.
- w. If **Student Requesting Group** is chosen the Batch Scheduler will attempt to schedule students who have requests for course groups before students without requests for course groups.
- x. For example, I have chosen to sort by **Student Requesting Groups** and **Student Last Name ASC**. Since **Student Requesting Group** is listed first this means the Batch Scheduler will attempt to schedule students who requested groups first and whose last names begins with the letter A and then all other students without requests for groups whose last name starts with A first.
- y. The **Section Overfilled Percent** field will be filled out according to your school's policy on overfilling. Some schools allow no overfilling and others allow five or ten percent or even more.
Note: If your school does not allow section overfilling, enter 0. If left blank, the scheduler will not complete.
- z. Example: If a course had a capacity of 20 and the **Section Overfilled Percent** was set to five percent that means the Batch Scheduler would overfill the course section by one student. (5% of 20 = 1)
 - aa. In the screenshot below I have chosen **5%**.
 - bb. Next, in the **Course Group Locking** dropdown choose either **Lock No Course Groups** which means that if a student has a request for a course that is part of a group but doesn't have a separate request for the group, the SSS will attempt to schedule the student into the course even if the course group is marked as **Is Locked** on the **Course Group Maintenance** page.

- cc. If **Honor Course Group Locks** is chosen then the Batch Scheduler will look at the course setup and if the group is locked and a student has a request for a course that is part of the group but doesn't have a separate request for the group itself the Batch Scheduler will not schedule the student in the course.
- dd. If **Lock All Course Groups** is chosen the Batch Scheduler will not attempt to schedule any request for a course that is part of a group even if the group isn't locked.
- ee. In the **Balance By Ethnicity** choose **No Balancing** or an ethnicity filter.
- ff. If an ethnicity is chosen from the dropdown the Batch Scheduler will attempt to schedule 50% of the ethnicity chosen and then the remaining 50% will be comprised of all other ethnicities not chosen.
- gg. Example: If **H-Hispanic** is chosen in the **Balance By Ethnicity** dropdown the Batch Scheduler will attempt to schedule each course section with 50% Hispanic students and the other 50% of students a mix of the remaining ethnicities that weren't chosen.
- hh. The **Time Limit Per Student** filter determines the maximum number of seconds that the scheduler will try to schedule each student.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters
Pass Level Parameters
Pass Control
Course Sequencing Rules
Teacher Link Groups
Submit

Grade Levels to Schedule:*

05 - 05	09 - 09
06 - 06	10 - 10
07 - 07	11 - 11
08 - 08	12 - 12

Course Terms to Schedule:*

1st Semester Course
2nd Semester Course
All Year Course

Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled.

Sort Criteria for Students who are being Scheduled:*

Student Number ASC	Student Requesting Group
Student Number DESC	Student Random
Student Schedule Priority	
Grade Level DESC	

Section Overfilled Percent:

Course Group Locking: Balance By Ethnicity:

Note: The Time Limit Per Student value determines the maximum number Of seconds that the scheduler will Try To schedule Each student.

Time Limit Per Student:

7. Click **Next** to move to the 2nd tab named **Pass Level Parameters**.
 - a. In the **Maximum Number of Passes** dropdown choose 3.
 - b. You can choose more or less if desired.
 - c. 99% of schools will choose 3 passes.
 - d. The **Maximum Number of Periods Per Day** filter typically defaults to the number of periods found on the **Periods of the Day Maintenance** page.
 - e. If you want to make sure there is room for study halls you may want to use a number that is lower than the actual number of periods for the school.

- f. Example: Your school has 10 periods in each day. You can type in 8 in the **Maximum Number of Periods Per Day** field so that you still have 2 open periods.
- g. 99% of schools will choose to leave the default value.
- h. Next, the **Maximum Variation of Courses Between Schedule Terms** can be set so the maximum of courses the student is scheduled into doesn't vary more than the specified value between course terms.
- i. Example: **Maximum Variation of Courses Between Schedule Terms** is set to 2. This means the student could have seven 1st Semester classes and nine 2nd Semester classes but couldn't have seven 1st Semester classes and ten 2nd Semester classes, because then the variation would be 3.
- j. Next, the **Maximum Variation of Course Weights Between Schedule Terms** option looks at the **Weight** value filled out on each course and balances the student's course section assignments so both terms are equally weighted.
- k. Example: A school chooses 10 in the **Maximum Variation of Courses Weights Between Schedule Terms** on the **Pass Level Parameters** tab. A student has 12 requests. Four requests are for All Year courses and each course has a weight of 10. Four requests are for 1st Semester Only courses and each course has a weight of five, and four requests are for 2nd Semester only courses and each course has a weight of ten. The sum of weights for All Year courses is 40, 1st Sem only courses is 20, and 2nd Sem only courses is 40. Since the school chose that the maximum variation couldn't be greater than ten the Batch Scheduler will attempt to schedule three All Year courses which would be a total weight of 30, all four 1st Sem only courses, which would be a total weight of 20, and three 2nd Sem only courses, which would be a total weight of 30. The maximum variation between course terms is ten.
- l. Approximately only 5% of schools will use this option.
- m. Next, the **Maximum Number of Days Allowed with Restricted Patterns** looks at the **Daily Pattern Rules** setup in SI and determines the number of days a student's schedule can break the **Daily Pattern Rules**.
- n. To setup **Daily Pattern Rules** navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Initialization** » **Daily Pattern Rules**.

Daily Pattern Rules

From this screen, you are able to specify default daily pattern rules for the master calendar.

Max Consecutive Courses:

Max Consecutive Artificial Courses:

- o. In the **Max Consecutive Course** field fill in the number of courses a student can have in a row without a study or lunch (artificial courses). In the **Max Consecutive Artificial Courses** fill in the number of artificial courses a student can have in a row. You can also control the placement of study halls on the **Study Hall Wizard** which will be explained in detail later in this document.
- p. Finally, the **Maximum Number of Days Allowed with Excessive Periods** is the maximum number of days a student's schedule may violate the **Max Periods Per Day Restriction** setup above.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

The screenshot shows the 'Schedule Job Wizard' interface with several tabs: 'Run Level Parameters', 'Pass Level Parameters', 'Pass Control', 'Course Sequencing Rules', 'Teacher Link Groups', and 'Submit'. The 'Pass Level Parameters' tab is active, displaying the following fields:

- Maximum Number of Passes:** A dropdown menu set to '3'. A note above it states: 'The number of passes executed by the scheduler. Note: the Single Student scheduler will only use the first pass even if multiple passes are selected'.
- Maximum Number of Periods Per Day:** A spinner field set to '7'. A note above it states: 'The maximum number of periods that a student may be assigned to courses on a rotation day'.
- Maximum Variation of Courses Between Schedule Terms:** A spinner field. A note above it states: 'The maximum difference, between any two schedule terms, in the number of courses to which a student is assigned'. A purple callout box points to this field with the text: 'If using this option make sure #5 on the Pass Control tab is checked.'
- Maximum Variation of Course Weights Between Schedule Terms:** A spinner field. A note above it states: 'The maximum difference, between any two schedule terms, in the total weight of courses to which a student is assigned'. A purple callout box points to this field with the text: 'If using this option make sure #6 on the Pass Control tab is checked.'
- Maximum Number of Days Allowed with Restricted Patterns:** A spinner field. A note above it states: 'The maximum number of days on which the courses to which a student is assigned may violate the Daily Pattern Rules'. A purple callout box points to this field with the text: 'If using this option make sure #2 on the Pass Control tab is checked.'
- Maximum Number of Days Allowed with Excessive Periods:** A spinner field. A note above it states: 'The maximum number of days on which the courses to which a student is assigned may violate the Max Periods Per Day restriction'. A purple callout box points to this field with the text: 'If using this option make sure #4 on the Pass Control tab is checked.'

At the bottom of the form are '< Back' and 'Next >' buttons.

- 8. Click **Next** to move to the third tab named **Pass Control**.
 - a. Since three passes were selected on the **Pass Level Parameters** tab three columns are showing on the **Pass Control** tab.
 - b. The Batch Scheduler will attempt to schedule the students in three passes.
 - c. The first pass should be the most restrictive pass, the second pass less restrictive, and the third pass the least restrictive.
 - d. The first option is **Enforce Course Sequencing Rules**.
 - e. If the school is using Course Sequencing Rules put a checkbox in the appropriate passes. Typically schools will choose to **Enforce Course Sequencing Rules** on all passes or zero passes.
 - f. Course Sequencing Rules will be explained when we move to the 4th tab which is named **Course Sequencing Rules**.
 - g. Approximately 50% of schools will use this option.

- h. The second option is named **Enforce Daily Pattern Rules**. If the school has setup **Daily Pattern Rules** and chose to use the **Maximum Number of Days Allowed with Restricted Patterns** on tab 2 they would want to put a check in the appropriate passes.
- i. Only approximately 5% of schools use this option.
- j. The third option is **Enforce Teacher Link Groups**. If the school is using Teacher Link Groups put a checkbox in the appropriate passes. Typically schools will choose to **Enforce Teacher Link Groups** on all passes or zero passes.
- k. Teacher Link Groups will be explained in greater detail when tab 5 is reached.
- l. Approximately 35% of schools will use this option. Typically the school will setup course groups instead of using **Teacher Link Groups**.
- m. The fourth option is named **Enforce Maximum Number of Periods Per Day**.
- n. If the school would like the Batch Scheduler to enforce the **Max Number of Periods Per Day** parameter setup on tab 1 check the appropriate passes.
- o. Typically a school would only enforce **Max Number of Periods Per Day** if the **Max Number of Periods** was setup to a number lower than the total number of periods the school offered in a day.
- p. Example: A school has 10 periods a day but on the **Max Number of Periods Per Day** on tab 2 they filled in 8. If the school would like to honor that parameter when the Batch Scheduler runs they would need to put a check in the appropriate passes.
- q. Approximately only 5% of schools use this option.
- r. The fifth option is named **Enforce Number of Courses Between Schedule Terms**.
- s. If the school would like to enforce the **Maximum Variation of Courses Between Schedule Terms** parameter that was filled out on the 2nd tab check the boxes on the appropriate passes.
- t. Approximately only 5% of schools use this option.
- u. The sixth option is named **Enforce Course Weights Between Schedule Terms**.
- v. If the school would like to enforce maximum **Variation of Course Weights Between Schedule Terms** that was filled out on the 2nd tab check the boxes on the appropriate passes.
- w. Approximately only 5% of schools use this option.
- x. The seventh option is named **Allow Section Overfilling**.
- y. Typically overfilling is chosen for the final pass which is the least restrictive pass. If 5% overfilling was chosen on tab 1 but checkbox to allow overfilling isn't marked none of the course sections will be overfilled.
- z. Approximately 95% of schools will use this option.
- aa. The eighth option is named **Try Alternates**.

- bb. When requests are entered the user has the option to specify an alternate request.
- cc. If your school would like the Batch Scheduler to attempt to schedule alternate requests if the primary request isn't available check the corresponding boxes. Typically schools allow alternates on the last pass which is the least restrictive pass.
- dd. Approximately 50% of schools will use this option.
- ee. The ninth option is named **Allow Partial Schedules**.
- ff. **Allow Partial Schedules** should always be checked for the final and least restrictive pass. **Allow Partial Schedules** isn't checked for the other passes because you want the Batch Scheduler to attempt to fully schedule the student and then if it can't honor all the student's requests by the time the Batch Scheduler gets to the final pass, the Batch Scheduler will attempt to honor the requests it can – thus giving the student a partial schedule.
- gg. All schools will use this option.
- hh. The tenth option is named **Order Requests By Priority**.
- ii. Each request has a priority. Please see the **Course and Course Group Step by Step** for information on how to set up course priority.
- jj. If **Order Requests By Priority** is marked on a pass the Batch Scheduler higher priority courses and course groups will be scheduled over lower priority courses and course groups.
- kk. If two course or course group requests have the same priority the Batch Scheduler, will look to see how often the course is offered. If one course is offered only once (singleton) and the other course is offered twice (doubleton) the Batch Scheduler will schedule the singleton before it schedules the doubleton.
- ll. Example: A student has a priority of 9 request for course A that has one course section (singleton), a priority 9 request for course B that has two course sections (a doubleton), and a priority 9 request for course C that has three course sections (a tripleton). The student also has a priority 7 request for course D, and a priority 4 request for course E. The Batch Scheduler will assign scheduling positions of 1 for request A, 2 for request B, 3 for request C, 4 for request D, and 5 for request E. When the Batch Scheduler schedules the student, it will never leave request A unscheduled in order to schedule requests B, C,D,or E. It will never leave request B unscheduled in order to schedule requests C,D, or E. It will never leave request C unscheduled in order to schedule requests D or E. And it will never leave request D unscheduled in order to schedule request E.
- mm. Typically schools honor course priority on all passes of the Batch Scheduler or no passes.
- nn. The eleventh option is **Enforce Requests with Assigned Teacher or Period**.

oo. When requests are entered users have the ability to specify a specific teacher or period. If specific teachers or periods have been requested SI State Support recommends enforcing this on all passes.

pp. Approximately 50% of schools will use this option.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

#	Description	1	2	3
1.	Enforce Course Sequencing Rules	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2.	Enforce Daily Pattern Rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Enforce Teacher Link Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4.	Enforce Maximum Number of Periods Per Day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	Enforce Number of Courses Between Schedule Terms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.	Enforce Course Weights Between Schedule Terms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.	Allow Section Overfilling	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8.	Try Alternates	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9.	Allow Partial Schedules	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10.	Order Requests By Priority	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11.	Enforce Requests with Assigned Teacher or Period	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

9. Click **Next** to move to the fourth tab named **Course Sequencing Rules**.
 - a. If the school wishes to use **Course Sequencing Rules** the rules will need to be setup on the fifth tab.
 - b. The Batch Scheduler assumes that if a student has a request for a course they have already been approved to take the course.
 - c. The Batch Scheduler will not check to make sure pre and co-reqs are met or if the student is in the appropriate grade level to take the course. All of this checking is done when the course request is entered.
 - d. Again the Batch Scheduler assumes all criteria for the course have been met.
 - e. The **Course Sequencing Rules** tab allows the school the option to tell SI that certain courses need to be taken in the same schedule term, an earlier schedule term, a later schedule terms, or not in the same schedule term.
 - f. In the **Primary Course** field enter the course code. Use the picker to find the course code if needed.
 - g. In the **Rule** dropdown choose **In Earlier Schedule Term, Not in Earlier Schedule Term, In Same Schedule Term, or Not in Same Schedule Term**.
 - h. In the **Secondary Course** field enter the course code. Use the course picker if needed.
 - i. The **Is Rigid** box can be checked if you want the Batch Scheduler to honor the course sequencing rules on all passes even though option #1, **Enforce Course Sequencing Rules**, isn't checked on the **Pass Control** tab.

- j. If the **Is Rigid** box isn't checked the Batch Scheduler will not honor the course sequencing rules unless option #1 on the **Pass Control** tab is checked.
- k. Click **Add**.
Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters	Pass Level Parameters	Pass Control	Course Sequencing Rules	Teacher Link Groups	Submit
Primary Course	Rule	Secondary Course	Is Rigid		
910111 - Art Foundations I	In Earlier Schedule Term	910112 - Art Foundations II	<input checked="" type="checkbox"/>		
910111 - Art Foundations I	In Same Schedule Term	910121 - Drawing	<input checked="" type="checkbox"/>		
910122 - Painting	In Earlier Schedule Term	910124 - Advanced Painting	<input checked="" type="checkbox"/>		
910125 - Photography	In Earlier Schedule Term	910126 - Advanced Photography	<input checked="" type="checkbox"/>		
910131 - Ceramics	In Earlier Schedule Term	910134 - Advanced Ceramics	<input checked="" type="checkbox"/>		
910132 - Sculpture	In Earlier Schedule Term	910135 - Advanced Sculpture	<input checked="" type="checkbox"/>		
950112 - PE II	Not In Same Schedule Term	950312 - Nutrition & Weight Management	<input checked="" type="checkbox"/>		

Primary Course:*

Rule:*

Secondary Course:*

Is Rigid:

- i. In the example screenshot the course sequencing rules says 910111-Art Foundations I must be taken in an earlier schedule term than 910112-Art Foundations II and the course sequencing rule **Is Rigid**. This means even if **#1 Enforce Course Sequencing Rules** isn't marked on the **Pass Control** tab the Batch Scheduler will still enforce the course sequencing rules.
10. Click **Next** to move to the fifth tab named **Teacher Link Groups**.
- a. **Teacher Link Groups** are used when a school wants students to have the same teacher for multiple courses but doesn't necessarily mind which course sections they are scheduled into-only that the teacher is the same.
 - b. Example: Mrs. Brown and Mr. Black each teach two sections Chemistry II and two sections of Chemistry Lab. If a student requested Chemistry II and Chemistry Lab the school wants the student to have the same teacher for both class and the lab but doesn't mind which section – as long as the teacher is the same.
 - c. In the **Teacher Link Group Name** field enter a name.
 - d. In the **Teacher Link Group Description** enter an optional description.
 - e. In the **Courses** dual select box pull the courses which require the students to take with the same teacher to the right.
 - f. Click **Add**.

- g. In the screenshot below, a teacher link group has been setup for courses Chem and Chem Lab.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Name	Description
Chem & Chem Lab	855112 & 855112L

Teacher Link Group Name: *

Teacher Link Group Description:

Courses: *

- 110740 - Restaurant Oper
- 800101 - College & Career Prep I
- 800102 - College & Career Prep II
- 810100 - Art Appreciation
- 810101 - Music Appreciation
- 810211 - PS Financial Accounting

Buttons: Add, < Back, Next >

11. Click **Next** to move to the final tab named **Submit**.
 - a. In the **Job Parameter Set Name** field enter a name.
 - b. Enter an optional description in the **Job Parameter Set Description** field.
 - c. Next put a check in the box next to **Set this Parameter Set as the Default Batch Parameter Set**.
 - d. The next option named **Clear Schedule Result Created by the Scheduler** if checked the Batch Scheduler will undo all course section assignments previously scheduled by the Batch Scheduler and attempt to reschedule the student into the courses.
 - e. If the other option named **Clear Schedule Results Created Manually** is checked the Batch Scheduler will undo any course sections assignments that were manually assigned and that originated from a request and attempt to reschedule them.
 - f. Typically a school will choose to **Clear Schedule Results Created by the Scheduler** so any assignments that were made in previous runs of the Batch Scheduler are undone and rescheduled so the student gets the best possible schedule.
 - g. Typically a school will not choose to **Clear Schedule Results Created Manually** because if the office staff went directly into a student's schedule and turned a request into an assignment chances are there was a specific reason for assigning the student into that

section and most likely the school doesn't want that undone when the Batch Scheduler runs.

- h. The Batch Scheduler only looks at requests. If the office staff went directly into the *Course Section Assignments* page or the **Request Assignments** page and manually added an assignment the Batch Scheduler will never undo that assignment. Remember the Batch Scheduler only works off requests.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters
Pass Level Parameters
Pass Control
Course Sequencing Rules
Teacher Link Groups
Submit

Is Active:

Job Parameter Set Name: *

Job Parameter Set Description:

Set this Parameter Set as the Default Batch Parameter Set

Set this Parameter Set as the Single Student Parameter Set

i If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests by one or more previous scheduler runs. It will then attempt to reschedule the associated Requests.

Clear Schedule Results Created By Scheduler

i If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests manually. It will then attempt to reschedule the associated Requests.

Clear Schedule Results Created Manually

Save Schedule Parameters
< Back

- i. Click **Save Schedule Parameters**.

12. The page refreshes and you are brought back to the **Job Parameter Set Maintenance** page.

From this screen, you can display, add, change and delete data pertaining to Job Parameter Sets, or Execute a Batch Scheduler Job .

Add Job Parameter Set

				Name	Description	Revision	Default Batch	Single Student	Is Active
🔒	✎	🔄	🕒	BS All Grades	Batch Scheduler All Grades	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	●
🔒	✎	🔄	🕒	Single Student Scheduler		2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	●

Show Active Only

- a. The parameter is listed on the page with a lock because it was marked as the **Default Batch Parameter Set**.
- b. Now we are ready to run the Batch Scheduler.



Don't forget to enter requests for lunches before running the Batch Scheduler. It is much easier to correct the issue now versus attempting to fix the issue after the Batch Scheduler has been executed multiple times.

Task #5 - Run the Batch Scheduler



Make sure you are in the correct school year before continuing. If you are scheduling for the 22/23 school year, you need to have your school year context set to 22/23. A confirmation message does display when you click the 3rd icon, Execute Job and Update Existing Schedule Result or 4th icon, Execute Job and Create New Schedule Result for a Job Parameter Set to confirm that you wish to run the Batch Scheduler for the school year in context.

If the Schedule is finalized for the school year in context on the StudentInformation Options page, these Execute icons are greyed out and you are not able to re-run the Batch Scheduler.



If the Batch Scheduler would happen to error out the error is only available off JAMS.



The Batch Scheduler will only schedule students who have an Overall Student Status of Active and have at least one course request.



Students with requests but whose Overall Student Status is a value other than Active will not be scheduled by the Batch Scheduler. If a school would like to schedule these students using the Batch Scheduler, State Support recommends temporarily changing the Overall Student Status value to Active and the changing it back after the Batch Scheduler has run.

1. At the building level in 22/23, navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Scheduler** » **Job Parameter Sets**.
2. Click on the third icon named ***Execute Job and Update Existing Schedule Result*** of the Default Batch Scheduler Parameter created in the previous task.
Note: When updating an existing Schedule Result, all previous Schedule Result records will be deleted, even those with a non-assigned status.
3. The page refreshes and now you are on the ***Submit*** tab of the job parameter.
4. In the ***Master Schedule*** dropdown select the Master Schedule. Typically schools will only have one Master Schedule in the dropdown.

5. In the **Schedule Result** dropdown select the schedule result you wish to work with.
 6. In the **Schedule Job Name** field enter a descriptive name. State Support recommends naming the job **22/23 all grades**.
 7. In the **Job Queue** dropdown select any queue listed, it doesn't matter which one you select.
 8. Since we had already placed a check in the box next to **Clear Schedule Results Created By Scheduler** when we setup the Batch Scheduler job parameter in the last task it is still checked.
 9. If you need to review what this option does please refer back to Task #4 where it is explained in detail.
 10. Once again make sure you are in 22/23.
 11. Click **Execute Schedule Job**.
- Schedule Job Wizard**

From this screen, you can run the Scheduler

Run Level Parameters	Pass Level Parameters	Pass Control	Course Sequencing Rules	Teacher Link Groups	Submit
----------------------	-----------------------	--------------	-------------------------	---------------------	--------

Master Schedule:*	Default Schedule ▾	Schedule Result:*	Default Schedule Result ▾
Schedule Job Name:*	All Grades	Job Queue:*	STUD - STUDENT ▾

i If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests by one or more previous scheduler runs. It will then attempt to reschedule the associated Requests.

Clear Schedule Results Created By Scheduler

i If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests manually. It will then attempt to reschedule the associated Requests.

Clear Schedule Results Created Manually

Execute Schedule Job < Back Cancel

12. The page refreshes and you are brought to the **Schedule Job History** page.
13. The job will be listed as **Pending** and then change to **Active**.
14. Click **Refresh Display** until the job says **Complete**.

Task #6 - Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules

1. On the **Schedule Job History** page, click on the Stats link for the job that just completed.
2. The page refreshes and you are brought to tab 1 named **Students Scheduled Summary** of the **Schedule Results Statistics** page.
 - a. The tab details how many students were scheduled on each pass.
 - b. The **Scheduled Status** column has five categories.
 - c. The **Fully Scheduled** category is the number of students who had all of their requests scheduled. If a student had two requests and the Batch Scheduler was able to fill both requests the student is considered fully scheduled.
 - d. The second category is named **Fully Scheduled With Request Error**.
 - e. The number of students listed in this category have received a full schedule for the requests that were schedulable, but one or more of his/her requests had a problem that prevented the Batch Scheduler from trying to schedule it, e.g. no course sections were setup for the requested course.
 - f. The third category is named **Partially Scheduled** is the number of students who didn't have all their requests scheduled.
 - g. The fourth category named **Not Scheduled** is the number of students who didn't have any of their requests scheduled. Remember – only students with requests are included in the statistics. If a student doesn't have any requests the student isn't included in this statistic. This applies to the Total Scheduled For All Passes and Percent Scheduled For All Passes.
 - h. The final category is named **Not Scheduled Due to Time Limit** is the number of students who couldn't be scheduled because the Batch Scheduler exceeded the number of seconds filled out in the **Time Limit Per Student** field on tab 1 of the job parameter. This applies to the Total Scheduled For All Passes and Percent Scheduled For All Passes.
 - i. State Support recommends scheduling these students by hand.

- j. The page also combines all passes and lists the statistics for **Total Scheduled For All Passes** and **Percent Scheduled For All Passes**.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary		Students Scheduled Detail		Course Status Messages		Request Status Messages		Requests	
Stat Type	Scheduled Status	Grade 12	Grade 11	Grade 10	Grade 09	Pass Total			
Total Scheduled For Pass 1	Fully Scheduled	87	156	211	232	686			
	Fully Scheduled With Request Error	0	0	0	0	0			
	Partially Scheduled	0	0	0	0	0			
Total Scheduled For Pass 2	Fully Scheduled	0	0	0	0	0			
	Fully Scheduled With Request Error	0	0	0	0	0			
	Partially Scheduled	0	0	0	0	0			
Total Scheduled For Pass 3	Fully Scheduled	0	0	0	0	0			
	Fully Scheduled With Request Error	0	0	0	0	0			
	Partially Scheduled	107	44	23	2	176			
Total Scheduled For All Passes	Fully Scheduled	87	156	211	232	686			
	Fully Scheduled With Request Error	0	0	0	0	0			
	Partially Scheduled	107	44	23	2	176			
	Not Scheduled	29	32	66	38	165			
	Not Scheduled Due To Time Limit	0	0	0	1	1			
Percent Scheduled For All Passes	% Fully Scheduled	39.01	67.24	70.33	84.98	66.73			
	% Fully Scheduled With Request Error	0	0	0	0	0			
	% Partially Scheduled	47.98	18.97	7.67	0.73	17.12			
	% Not Scheduled	13	13.79	22	13.92	16.05			
	% Not Scheduled Due To Time Limit	0	0	0	0.37	0.1			

- The second tab is named **Students Scheduled Detail** lists the student's name and student's number for each of the five categories. If the category said zero students then the category will not listed on the **Students Scheduled Detail**.
- The third tab is named **Course Status Messages** lists each course, course sections, group, and group section that meets the following criteria, even if there were no requests for the course:
 - Course has no Course Sections on the master schedule
 - Group has no Group Sections on the master schedule
 - Course is not Active
 - Course Has No Course Sections with Meeting Times on the Master Schedule
 - Course has no section in selected course terms

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Course	Course Section	Group	Group Section	Message	Requested
900110				Course Has No Course Sections with Meeting Times on the Master Schedule	No
920101				Course Has No Course Sections with Meeting Times on the Master Schedule	No
960108				Course Has No Course Sections with Meeting Times on the Master Schedule	No
900101				Course Has No Course Sections with Meeting Times on the Master Schedule	No
940313				Course has no Course Sections on the master schedule	No
B20133				Course has no Course Sections on the master schedule	No

5. The fourth tab is named **Request Status Messages** details the students who have request errors.

- a. The following screenshots shows some example errors.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Student	Course	Message
194312	965251	Student has multiple requests for the same course
192918	965252	Student has multiple requests for the same course
192918	A60211	Student has multiple requests for the same course

- b. If a student has multiple requests for the same course the Batch Scheduler will not double schedule the student. If the student does need to be scheduled into the same course more than once the office staff will need to manually put the student in the course on either the **Course Section Assignments** page or the **Request Assignments** page.

6. The fifth tab named **Requests Exceeding Course Capacity** details the courses in which the number of requests for the course exceeded the capacity for the course.

- a. In the following screenshot course 910134 has 39 requests but a capacity of 30. This statistic lets the school know they would need to increase capacity or add another section of course 910134 if they want to meet the full demand.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Course	Requests Count	Capacity
910134	39	30
910123	35	30
A25311	65	64
B25311	65	64

7. The final tab named **Constraint Test Failures** details the number of students that couldn't be scheduled due to **Course Sequencing Rules** that were setup, **Daily Pattern Rules**, **Max Course Deviation**, **Max Course Weight Deviation**, and **Max Periods Per Day**.

- a. If none of these options were used when the Batch Scheduler was run each category will say zero.
- b. In the following screenshot the Batch Scheduler was setup to run with Course Sequencing Rules. Two students couldn't have all their requests fulfilled because of the course sequencing rules.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary	Students Scheduled Detail	Course Status Messages	Request Status Messages	Requests Exceeding Course Capacity	Constraint Test Failures
Course Sequencing Rule:	10				
Daily Pattern Rule:	0				
Max Course Deviation:	0				
Max Course Weight Deviation:	0				
Max Periods Per Day:	0				

8. The **R413 Students Scheduled with Alternate Courses** report lists students who have been scheduled into their alternate course request instead of their primary course request.

REPORT: DASL - R413		ELMWOOD HIGH SCHOOL					PAGE 1 OF 1	
STUDENTS SCHEDULED WITH ALTERNATE COURSES								
ID	STUDENT NAME	GR	GN	HPRM	HOME DIST	ORIGINAL REQUEST	ALTERNATE SCHEDULED CLASS	TERM
12274	Student100061, MICHAEL	12	M			French-French 1	610-LATIN I	All Year

9. The **R415 Student Scheduled With Free Time** report lists any open periods the student has.

Report: R415		ELMWOOD HIGH SCHOOL											
Student Scheduled With Free Time													
Student Number	Student Name	St	Gr	Gd	HmRm	Disability Condition	Dist of Res	Period	Rotation Days	Schedule Terms			
										08/29/2011	10/24/2011	01/09/2012	03/26/2012
10781	Student101112, KAYLA	A	12	F									
								51	MTWRF	X	X	X	X
								52	MTWRF			X	X
								53	MTWRF	X	X		
								06	MTWRF	X	X	X	X
								07	MTWRF	X	X	X	X
								08	MTWRF	X	X	X	X

- a. If a student has an assignment for a period the period won't be listed on the report. (In the example screenshot above period 00-04 isn't listed because the student isn't free those periods, she has assignments.)
10. The **R424 Student Scheduled in one Course Section and Not Another** generates a list of students who are scheduled into only one course for a specified pair of courses.

REPORT: DASL - R424		ELMWOOD HIGH SCHOOL												
STUDENTS SCHEDULED INTO ONE COURSE/SECTION AND NOT ANOTHER														
COURSE 1: 1047			SECT NO: 1			AND NOT			COURSE 2: 930			SECT NO: 1		
COUNSELLOR														
12390	Student99980, AIRICA	12	F			ALLEN	Teacher2060							
12230	Student100096, MYRIAH	12	F			ALLEN	Teacher2060							
12012	Student100288, KELSEY	12	F			DEB	Teacher2117							
12241	Student100080, MONICA	12	F			ALLEN	Teacher2060							
12099	Student100183, ALEXIS	12	F			ALLEN	Teacher2060							

11. The **R425 Students Scheduled Into Two Assigned Course Sections** generates a list of students who are assigned to a specific pair of courses.

REPORT: DASL - R425		ELMWOOD HIGH SCHOOL				RUN AT 9:38 AM 1/5/2011	
STUDENTS SCHEDULED INTO TWO ASSIGNED COURSES/SECTIONS						PAGE 1 OF 1	
SCHOOLYEAR:	COURSE	1047	PRE-CALCULUS				
ID	STUDENT NAME	GR	GN	MRM	PR	COUNSELOR	COURSES
							990
12009	Student100299, JOY	F	**	DEB Teacher1117	2	JACM	
12059	Student100220, JOSIE	F	**		4	RVAR	
12102	Student100177, KAITLYN	F	G		2	JACM	
12104	Student100178, BRIDGET	F		ALLEN Teacher2060	2	JACM	
12156	Student100123, SARAH	F	**		2	JACM	
12237	Student100024, CASSIDY	F	**		1	JACM	
12243	Student100075, JAMUCE	F	**	DEB Teacher1117	2	JACM	
12220	Student100023, MYEMA	F			4	RVAR	
12392	Student99955, CHEBARE'	F			2	JACM	

12. The **R426 Student Scheduling Analysis** lists each student's requests and if they were assigned into the course or their request could not be met.

REPORT: DASL - R426		ELMWOOD HIGH SCHOOL				RUN AT 9:46 AM 1/5/2011	
STUDENT SCHEDULING ANALYSIS REPORT						PAGE 3 OF 27	
Student99454, REBECCA		NON-ASSIGNED : 2		NUMBER : 13199		GRADE : 10 GENDER : F MRM:	
TERM	COURSE	SEC	DESCRIPTION	DAYS	PERIOD	STATUS	
	1222		CHEMISTRY I			All Full Sections	
	1047		PRE-CALCULUS			All Full Sections	
2nd	710	8	HEALTH	MTWRF	04	Assigned	
YEAR	1320	6	U.S. SOCIAL STUDIES 10	MTWRF	51,53	Assigned	
1st	Lun1	2	Lunch 1	MTWRF	52	Assigned	
2nd	Lun2	2	Lunch 2	MTWRF	52	Assigned	

13. The **R807 Section Summary by Report Period** lists each course section and if it is open or closed.

REPORT: DASL - R807		ELMWOOD HIGH SCHOOL				PAGE 1 OF 13			
SECTION SUMMARY BY REPORT PERIOD									
COURSE ID	COURSE DESCRIPTION	TERM	SECTION ID	TEACHER NAME	PERIODS	ROOM ID	SECTION CAPACITY	STUDENTS ENROLLED	CLASS STATUS
CU200	CU ART	1st	2	LANA Teacher2163	03	123	25		All
SA53	SA53	1st	3	HEATHER Teacher2143	53	203	5		All
SH1	SH1	1st	1	Jim Teacher1916	01	205	150		All
SA51	SA51	1st	2	CAROLYN Teacher1977	51	201	15		All
SA4	SA4	1st	21	MATT Teacher1945	04	118	5		All
CU711	CU Phys Ed	1st	1	CHARLES Teacher2108	52	123	5		All

14. The **R407 Class Master Schedule** lists each course section and group course section. The demand count on the **R407** is the number of students who have a request for the course that hasn't been fulfilled yet.

Group: (none)		(none)	Gr Cap:	Demand:	Gr Section:	Sec Cap:				
Course: 140	AGRI-BUSINESS			Credits: 1.000	Dpt: AG	Demand: 1				
Sec Term	Day/Period/Location/Staff			Cap	M	F	Tot	Open		
1 YEAR	MTWRF / 03 / 122				DENNIS Teacher1934	7	0	0	0	7
Course: 220	DRAWING & PAINTING II			Credits: 0.500	Dpt: ART	Demand: 1				
Sec Term	Day/Period/Location/Staff			Cap	M	F	Tot	Open		
1 1st	MTWRF / 51, 52 / 204				MARTHA Teacher2035	10	0	0	0	10
2 1st	MTWRF / 08 / 204				MARTHA Teacher2035	25	0	0	0	25
Totals:						35	0	0	0	35

Task #7 - Make applicable changes and rerun the Batch Scheduler – updating the existing schedule result set

Updating the existing schedule result set is the simplest method.



StudentInformation recommends using this option if you are new to SI scheduling. Updating the existing schedule results option keeps things simple. Users only have one result set to choose from when making schedule changes so there is no chance that schedule changes are made on the wrong schedule result set. Once you become familiar with how Batch Scheduler works you can use the other method which is to create a new result set each time next year.



A student has a request for Spanish. The Batch Scheduler is run and a student is scheduled into Spanish-1. The student then decides they don't want to take Spanish anymore. Simply deleting the request for Spanish will not unassign the assignment for Spanish the next time the Batch Scheduler is run, even if the option to Clear Results Created by the Scheduler is marked. The Batch Scheduler only looks at requests and if the request for Spanish is deleted but the assignment remains the Batch Scheduler will not touch the assignment for Spanish since there is no corresponding request. Both the assignment and request for Spanish should be removed/deleted.



Make sure you are in the correct school year before continuing. If you are scheduling for the 22/23 school year, you need to have your context set to 22/23. A confirmation message does display when you click the 3rd icon Execute Job and Update Existing Schedule Result or 4th icon Execute Job and Create New Schedule Result for a Job Parameter Set to confirm that you wish to run the Batch Scheduler for the school year in context.

If the Schedule is finalized for the school year in context on the StudentInformation Options page, these Execute icons are greyed out and you are not able to re-run the Batch Scheduler.

1. After fixing any conflicts, errors, adding course sections, and editing meeting times rerun the Batch Scheduler.
2. Navigate to **Student Information** » **Management** » **School Administration** » **Scheduling Administration** » **Scheduler** » **Schedule Job History**.

- a. The Batch Scheduler's last run will appear at the top of the list.
- b. Click the Rerun Job link.

Schedule Job History

From this screen, you can view all previously run schedule jobs for the current school and school year.

Result Set: Job Type: Job Status:

			Job Name	Schedule Result Set	Run Time	Duration (min)	Job Type	Status	Username
Stats	Job Params	Rerun Job	SSST All Grades	SSST All Grades	12/29/2016 01:49 PM	10	Batch	Complete	devin.launder

- c. The page refreshes and you are brought to the **Submit** tab of the Parameter Set used in the last run.
- d. The **Schedule Job Name** field is defaulting to what you filled in on your first run which was **22/23 all grades**. You can change the name to something like **22/23 all grades 2nd try** or leave it as it. Either one will work.
- e. Select any queue from the **Job Queue** dropdown.
- f. The **Clear Results Created By Scheduler** and **Clear Schedule Results Created Manually** will default to what was selected in the last run.
- g. SI State Support recommends checking **Clear Schedule Results Created By the Scheduler** so students can get the best possible schedule.
- h. Click **Execute Schedule Job**.

From this screen, you can run the Scheduler

Master Schedule:*
 Schedule Result:*

Schedule Job Name:*
 Job Queue:*

Clear Schedule Results Created By Scheduler
If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests by one or more previous scheduler runs. It will then attempt to reschedule the associated Requests.

Clear Schedule Results Created Manually
If checked, the scheduler will first clear from the Schedule Result set chosen above, any assignments that were made for Requests manually. It will then attempt to reschedule the associated Requests.

- i. The page refreshes and you are brought back to the **Schedule Job History** page.
- j. Click **Refresh Display** until the job completes.

Task #8 - Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules

1. On the **Schedule Job History** page, click on the Stats link for the job that just completed.
2. The page refreshes and you are brought to tab 1 named **Students Scheduled Summary** of the **Schedule Results Statistics** page.
 - a. The tab details how many students were scheduled on each pass.
 - b. The **Scheduled Status** column has five categories.
 - c. The **Fully Scheduled** category is the number of students who had all of their requests scheduled. If a student had two requests and the Batch Scheduler was able to fill both requests the student is considered fully scheduled.
 - d. The second category is named **Fully Scheduled With Request Error**. The number of students listed in this category have received a full schedule for the requests that were schedulable, but one or more of his/her requests had a problem that prevented the Batch Scheduler from trying to schedule it, e.g. no course sections were setup for the requested course.
 - e. The third category is named **Partially Scheduled** is the number of students who didn't have all their requests scheduled.
 - f. The fourth category is named **Not Scheduled** is the number of students who didn't have any of their requests scheduled. Remember – only students with requests are included in the statistics. If a student doesn't have any requests the student isn't included in this statistic.
 - g. The final category is named **Not Scheduled Due to Time Limit** is the number of students who couldn't be scheduled because the Batch Scheduler exceeded the number of seconds filled out in the **Time Limit Per Student** field on tab 1 of the job parameter.
 - h. The page lists these statistics for each pass. The page also combines all passes and lists the statistics for **Total Scheduled For All Passes** and **Percent Scheduled For All Passes**.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Students Scheduled Summary		Students Scheduled Detail		Course Status Messages		Request Status Messages		Requests
Stat Type	Scheduled Status	Grade 12	Grade 11	Grade 10	Grade 09	Pass Total		
Total Scheduled For Pass 1	Fully Scheduled	87	156	211	232	686		
	Fully Scheduled With Request Error	0	0	0	0	0		
	Partially Scheduled	0	0	0	0	0		
Total Scheduled For Pass 2	Fully Scheduled	0	0	0	0	0		
	Fully Scheduled With Request Error	0	0	0	0	0		
	Partially Scheduled	0	0	0	0	0		
Total Scheduled For Pass 3	Fully Scheduled	0	0	0	0	0		
	Fully Scheduled With Request Error	0	0	0	0	0		
	Partially Scheduled	0	0	0	0	0		
Total Scheduled For All Passes	Fully Scheduled	87	156	211	232	686		
	Fully Scheduled With Request Error	0	0	0	0	0		
	Partially Scheduled	107	44	23	2	176		
	Not Scheduled	29	32	66	38	165		
	Not Scheduled Due To Time Limit	0	0	0	1	1		
Percent Scheduled For All Passes	% Fully Scheduled	39.01	67.24	70.33	84.98	66.73		
	% Fully Scheduled With Request Error	0	0	0	0	0		
	% Partially Scheduled	47.98	18.97	7.67	0.73	17.12		
	% Not Scheduled	13	13.79	22	13.92	16.05		
	% Not Scheduled Due To Time Limit	0	0	0	0.37	0.1		

3. The second tab named **Students Scheduled Detail** lists the student's name and student's number for each of the five categories. If the category said zero students then the category will not listed on the **Students Scheduled Detail**.
4. The third tab is named **Course Status Messages** lists each course, course sections, group, and group section that meets the following criteria, even if there were no requests for the course:
 - Course has no Course Sections on the master schedule
 - Group has no Group Sections on the master schedule
 - Course is not Active
 - Course Has No Course Sections with Meeting Times on the Master Schedule
 - Course has no section in selected course terms

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Course	Course Section	Group	Group Section	Message	Requested
900110				Course Has No Course Sections with Meeting Times on the Master Schedule	No
920101				Course Has No Course Sections with Meeting Times on the Master Schedule	No
960108				Course Has No Course Sections with Meeting Times on the Master Schedule	No
900101				Course Has No Course Sections with Meeting Times on the Master Schedule	No
940313				Course has no Course Sections on the master schedule	No

5. The fourth tab is named **Request Status Messages** details the students who have request errors.

- a. The following screenshots shows example errors.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Course	Course Section	Group	Group Section	Message	Requested
900110				Course Has No Course Sections with Meeting Times on the Master Schedule	No
920101				Course Has No Course Sections with Meeting Times on the Master Schedule	No
960108				Course Has No Course Sections with Meeting Times on the Master Schedule	No
900101				Course Has No Course Sections with Meeting Times on the Master Schedule	No
940313				Course has no Course Sections on the master schedule	No
B20133				Course has no Course Sections on the master schedule	No

- b. If a student has multiple requests for the same course the Batch Scheduler will not double schedule the student. If the student does need to be scheduled into the same course more than once the office staff will need to manually put the student in the course on either the **Course Section Assignments** page or the **Request Assignments** page.
6. The fifth tab is named **Requests Exceeding Course Capacity** details the courses in which the number of requests for the course exceeded the capacity for the course.

- a. In the following screenshot course H/PEII has 80 requests but a capacity of 50. This statistic lets the school know it may want to consider adding another section of course H/PEII to meet the demand.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Course	Requests Count	Capacity
910134	39	30
910123	35	30
A25311	65	64
B25311	65	64

- 7. The final tab is named **Constraint Test Failures** details the number of students that couldn't be scheduled due to **Course Sequencing Rules** that were setup, **Daily Pattern Rules**, **Max Course Deviation**, **Max Course Weight Deviation**, and **Max Periods Per Day**.

- a. If none of these options were used when the Batch Scheduler was run each category will say zero.
- b. In the following screenshot the Batch Scheduler was setup to run with Course Sequencing Rules. Two students couldn't have all their requests fulfilled because of the course sequencing rules.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Course Sequencing Rule:	10
Daily Pattern Rule:	0
Max Course Deviation:	0
Max Course Weight Deviation:	0
Max Periods Per Day:	0

- 8. The **R413 Students Scheduled with Alternate Courses** report lists students who have been scheduled into an alternate course request instead of their primary course request.

ID	STUDENT NAME	GR	GN	HIGH	HOME DIST	ORIGINAL REQUEST	ALTERNATE SCHEDULED CLASS	TERM
12274	Student100061, MICHAEL	12	M			French-French 1	610-LATIN I	All Year

9. The **R415A Student Scheduled With Free Time** report lists any open periods the student has. The **R415B Student Scheduled With Free Time by Period** report lists any open periods students have by period.

Report: R415 ELMWOOD HIGH SCHOOL

Student Scheduled With Free Time

Student Number	Student Name	St	Gr	Gd	HmRm	Disability Condition	Dist of Res	Period	Rotation Days	Schedule Terms			
										08/29/2011	10/24/2011	01/09/2012	03/26/2012
10781	Student101112, KAYLA	A	12	F				51	MTWRF	X	X	X	X
								52	MTWRF			X	X
								53	MTWRF	X	X		
								06	MTWRF	X	X	X	X
								07	MTWRF	X	X	X	X
								08	MTWRF	X	X	X	X

- a. If a student has an assignment for a period the period won't be listed on the report. (In the example R415A screenshot above period 01 isn't listed because the student isn't free that period, she has an assignment.)

10. The **R424 Student Scheduled in one Course Section and Not Another** generates a list of students who are scheduled into only one course for a specified pair of courses.

REPORT: DASL - R424 ELMWOOD HIGH SCHOOL

STUDENTS SCHEDULED INTO ONE COURSE/SECTION AND NOT ANOTHER

PAGE 1 OF 2

COURSE 1: 1047 SECT NO: 1 AND NOT COURSE 2: 930 SECT NO: 1

ID	STUDENT NAME	GR	GN	HGRM	PR	COUNSELLOR
12390	Student99950, AIRICA	12	F			ALLEN Teacher2060
12230	Student100096, MURIAH	12	F			ALLEN Teacher2060
12012	Student100288, KELSEY	12	F			DEB Teacher2117
12241	Student100080, MONICA	12	F			ALLEN Teacher2060
12099	Student100189, ALEXIS	12	F			ALLEN Teacher2060

11. The **R425 Students Scheduled Into Two Assigned Course Sections** generates a list of students who are assigned to a specific pair of courses.

REPORT: DASL - R425 ELMWOOD HIGH SCHOOL

STUDENTS SCHEDULED INTO TWO ASSIGNED COURSES/SECTIONS

PAGE 1 OF 1

SCHOOLYEAR: COURSE 1047 PRE-CALCULUS

ID	STUDENT NAME	GR	GN	HGRM	PR	COUNSELOR	COURSES
12009	Student100290, JOY	F			**	DEB Teacher2117	3 JKCM
12089	Student100228, JOSIE	F			**		4 HWAR
12102	Student100177, KAITLIN	F			G		3 JKCM
12104	Student100175, BRIDGET	F				ALLEN Teacher2060	2 JKCM
12186	Student100123, SARAH	F			**		3 JKCM
12237	Student100084, CASSIDY	F			**		1 JKCM
12249	Student100075, JAMICE	F			**	DEB Teacher2117	2 JKCM
12320	Student100023, MYDIA	F					4 HWAR
12382	Student99955, CHEHARE'	F					3 JKCM

12. The **R426 Student Scheduling Analysis** lists each student's requests and if they were assigned into the course or their request could not be met.

REPORT: DASL - R426		ELMWOOD HIGH SCHOOL				STUDENT SCHEDULING ANALYSIS REPORT		PAGE 3 OF 27	
Student99454, REBECCA		NON-ASSIGNED : 2		NUMBER : 13199		GRADE : 10		GENDER : F HBRM:	
TERM	COURSE	SEC	DESCRIPTION	DAYS	PERIOD	STATUS			
	1222		CHEMISTRY I			All Full Sections			
	1047		PRE-CALCULUS			All Full Sections			
2nd	710	8	HEALTH	MTWRF	04	Assigned			
YEAR	1920	6	U.S. SOCIAL STUDIES 10	MTWRF	51,59	Assigned			
1st	Lun1	2	Lunch 1	MTWRF	52	Assigned			
2nd	Lun2	2	Lunch 2	MTWRF	52	Assigned			

13. The **R807 Section Summary by Report Period** lists each course section and if it is open or closed.

REPORT: DASL - R807		ELMWOOD HIGH SCHOOL				SECTION SUMMARY BY REPORT PERIOD		PAGE 1 OF 13	
COURSE ID	COURSE DESCRIPTION	TERM	SECTION ID	TEACHER NAME	PERIODS	ROOM ID	SECTION CAPACITY	STUDENTS ENROLLED	CLASS STATUS
CU200	CU ART	1st	2	LANA Teacher2163	03	123	25		All
SA53	SA53	1st	3	HEATHER Teacher2143	53	203	5		All
SH1	SH1	1st	1	Jim Teacher1916	01	205	150		All
SA51	SA51	1st	2	CAROLYN Teacher1977	51	201	15		All
SA4	SA4	1st	21	MATT Teacher1945	04	118	5		All
CU711	CU Phys Ed	1st	1	CHARLES Teacher2108	52	123	5		All

14. The **R407 Class Master Schedule** lists each course section and group course section. The demand count on the **R407** is the number of students who have a request for the course but who didn't get scheduled into the course when the Batch Scheduler was run.

Report: R407		ELMWOOD HIGH SCHOOL				Class Master Schedule			
Group: (none)	(none)	Gr Cap:	Demand:	Gr Section:	Sec Cap:				
Course: 140	AGRI-BUSINESS	Credits: 1.000	Dpt: AG	Demand: 1					
Sec Term	Day/Period/Location/Staff			Cap	M	F	Tot	Open	
1 YEAR	MTWRF / 03 / 122	DENNIS Teacher1934		7	0	0	0	7	
Course: 220	DRAWING & PAINTING II	Credits: 0.500	Dpt: ART	Demand: 1					
Sec Term	Day/Period/Location/Staff			Cap	M	F	Tot	Open	
1 1st	MTWRF / 51, 52 / 204	MARTHA Teacher2035		10	0	0	0	10	
2 1st	MTWRF / 08 / 204	MARTHA Teacher2035		25	0	0	0	25	
Totals:				35	0	0	0	35	

Task #9 – Remove unwanted requests and assignments

The remove function will be the only option enabled when dropping a course if school hasn't started. Once the first day of school arrives the drop, remove, and transfer functions will all be enabled for course sections that are in progress. If the course term hasn't started yet, the transfer function will be disabled on the course section.

Student Information > SIS > Scheduling > Course Section Assignments

Find Student(s) [Go To]

WARNING: You are working with a Future School Year

Course Section Assignments

From this screen, you can display, add, change and delete data pertaining to Course Section Assignments.

Student: DAILY, DANIEL

Course Info	Term Info
Course: 2520 Sec: 22 Course Name: WORLD AFFAIRS Start Date: 1/15/2018	Term: 2nd Semester Course Start Date: 1/15/2018 Stop Date: 5/25/2018

Remove / Delete

Save Cancel

Performing a remove permanently deletes the assignment from all scheduling pages.

If an assignment is removed also ensure the request is also deleted.

Remove unwanted requests and assignments using the Request Assignments page

1. With a student in context navigate to **Student Information** » **SIS** » **Student** » **Student Schedule** » **Request Assignments**.
2. Select a schedule from the **Working Schedule** dropdown and a schedule result set from the **Result**.
3. Click on the trash can next to the assignment needing removed.
4. The right side of the screen refreshes.
 - a. The **Remove/Delete** option is the only option available since the first day of school hasn't arrived.
 - b. When a remove is done, SI automatically assumes the student should have never been scheduled into the course and permanently deletes it.
 - c. Place a check in the box next to **Delete Request**.
 - d. Removing the assignment and deleting the request will ensure that the student will not get scheduled into the course again the next time the Batch Scheduler runs.
 - e. Click **Save**.
 - f. The following message will display, **Assignment Saved**.

Remove unwanted requests and assignments using the Requests page

1. With a student in context navigate to **StudentInformation** » **SIS** » **Scheduling** » **Requests**.
2. Select a schedule from the **Schedule** dropdown and a schedule result set from the **Schedule Result** dropdown. Check option to **Display Assignments**, click **Search**.
3. Click on the trash can next to the assignment needing removed.
4. The screen will refresh.
 - a. The **Remove/Delete** option is the only option enabled since the first day of school hasn't arrived.
 - b. Click **Save**.
 - c. The following message will display, **The selected Course Section Assignment was marked for deletion. Click save changes button to commit to the database.** Click **Save Changes**.
 - d. The following displays, **The Course Section Assignments have been successfully saved.**
5. Now the request also needs deleted.
 - a. Click on the trash can next to the request.
 - b. Click **OK** to complete the deletion of the request.

Task #10 - Rerun Batch Scheduler as many times as needed

Redo Tasks #5 and #6 until the desired results are achieved.

Task #11 - Clean up students that are not fully scheduled using the Request page

1. With a student in context, navigate to **StudentInformation** » **SIS** » **Scheduling** » **Requests**.
 - a. On the **Requests** page there are two dropdowns. One dropdown is for the Master Schedule and one dropdown is for the Schedule Result Set.
 - b. Since in the previous tasks we have chosen to Update the Existing Result Set there is only one Result Set to choose from in the dropdown.
 - c. This makes things very easy and there is no way you could accidentally make changes to a student's schedule on the wrong result set.

Student Requests

From this screen, you can display, add, change and delete data pertaining to course/group requests.

Prim Req	Alt Req	Priority	Req. Status	Active	Assignment	Type	Status
EN4B - CP English 12B		9	Approved	●	EN4B - CP English 12B Section: 1	Batch	Assigned
ENCR - Creative Writing and Drama		5	Approved	●		Batch	Conflict
SCS - Zoology		5	Approved	●	SCS - Zoology Section: 1	Batch	Assigned
SS4A - Government A		9	Approved	●	SS4A - Government A Section: 2	Batch	Assigned
SS4B - Government B		9	Approved	●	SS4B - Government B Section: 1	Batch	Assigned
SS6 - World Geography		5	Approved	●		Batch	All Full Sections

2. In the screenshot above the student's request for **SS6 – World Geography** went unfulfilled.
 - a. The **Status** column says **All Full Section**.
 - b. Click on the plus icon to the right of the request to turn the request for **SS6** into an assignment.
 - c. The page refreshes and you are brought to the **Course Section Assignments** page.
 - d. Enter a section # or click the Ellipse icon to choose a section number.
 - e. If you clicked on the Ellipse icon a new window pops up that shows you each section of the course and its capacity and filling count

Non-Groups or Groups: Non-Groups Groups

Course Code: x Course Type:

Name:

Department: EMIS Subject Code:

Area of Study: Course Subject Area:

Teacher: Honors Only

Rotation Day: M T W R F Period of the Day:

Course Code - Name	Department	Course Sections				
SS6 - World Geography	Social Studies	<i>Section Term</i>	<i>Teacher(s)</i>	<i>Meeting Time</i>	<i>Capacity/Filling</i>	
		1 S2	Mr. M Jones	02 (107)	30	12.00
		2 S2	Mr. M Jones	07 (107)	30	23.00

- f. Click on the blue link for the section number and the section number will be automatically filled in for you.
- g. The **Assignment Start Date** field should default to the first day of school.
- h. Click **Save**.

Task #12 - Clean up students that are not fully scheduled using the Request Assignments page



Many users prefer to use the Request Assignments page versus the Requests page because on the Request Assignments page they can see requests, assignments that originated from requests, and assignments that didn't originate from requests all on the same page.

1. With a student in context navigate to **StudentInformation** » **SIS** » **Student** » **Student Schedule** » **Request Assignments**.
 - a. On the **Student Requests & Assignments** page, there are two dropdowns. One dropdown for the Master Schedule and one dropdown for the Schedule Result Set.
 - b. Since in the previous tasks we have chosen to Update the Existing Result Set, there is only one Result Set to choose from in the dropdown.
 - c. This makes things very easy and there is no way you could accidentally make changes to a student's schedule on the wrong result set.
2. The student for example has a request for course 1140.
 - a. The request couldn't be turned into an assignment. Unlike the Requests page, the Request Assignments page does not tell you why the request couldn't be fulfilled. (The Requests page notated if all course sections were full or if there was a conflict.)
 - b. Click on the Edit Pencil under the Assignment column on the corresponding line for 1140.
 - c. The right side of the screen does a partial refresh.
3. There are three available sections of course 1140.
 - a. The flag symbol represents a scheduling conflict.
 - b. The person with an X symbol represents the section is filled to capacity and scheduling the student into the section would overfill the section.
 - c. Click on the **Assign** icon to the left of section 30 to assign the student into section 30.
 - d. The right side of the screen refreshes again and the following is displayed.
 - e. In the **Assignment Start Date** field defaults to the first day of the course term.
 - f. Click **Save Assignment**.
 - g. The following warning message will appear since the section would cause a scheduling conflict and /or would be overfilled

• - Course 1140 section 30 is filled to capacity
 - An assignment to course 1140 section 30 would create a scheduling conflict
 - If you click to save again, you can override this warning

Request	Assignment					
	Primary	Alt.	Course	Sec	Start	Drop
8000		8000	12	1/3/2017		
4200		4200	21	8/15/2016		
3180		3180	30	8/15/2016		
6120		6120	40	8/15/2016		
3220		3220	70	8/15/2016		
1140						

View Display Options | Close Assignments | View Schedule Graph

Add Assignment

Course/Section: 1140 30 [View Details](#)

Assignment Start Date: 08/15/2016

Assignment Stop Date:

[< Back](#)
[Save Assignment](#)
[Cancel](#)

- h. If you have security permissions to override and allow course section conflicts, the **Save Assignment** button will be enabled. If you don't have permission to override you will need to select **Cancel** and choose another course section.
- i. The assignment for 1140-30 appears on the same line as the request for 1140. This is how you can tell an assignment originated from a request, because they appear on the same line.
4. Now, a different student has a request for course 1011 and an assignment for course section 1011-1.
 - a. The assignment doesn't appear on the same line as the request. Since they don't appear on the same line I can tell this course didn't originate from a request. The course section assignment was directly added to the student's schedule.
 - b. If the school would run the Batch Scheduler again the Batch Scheduler would try to schedule the student's request for course 1011 since the request is still unfulfilled.
 - c. The school should delete the request for course 1011 so the student doesn't get double scheduled into course 1011. If they don't delete the request the student could be assigned once manually by a user and another time by the Batch Scheduler.
 - d. To delete a request click on the Edit Pencil to the left of the request for 1011.
 - e. The right side of your screen refreshes.
 - f. Click **Delete Request**.
 - g. The page refreshes.
 - h. Uncheck **Show Active Only**.
 - i. The inactivated request for course 1011 will now show since Show Active only was unchecked.
 - j. The Batch Scheduler will not attempt to schedule the student into course 1011 since the request is now inactive.
5. The Batch Scheduler only schedules active requests. The **Request Assignments** page has several other helpful features.
 - a. One of those features is the Schedule Graph.
 - b. Click **View Schedule Graph** in the upper right corner of the **Request Assignments** page.















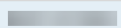
- c. The bottom of the page refreshes and a graph is displayed.

M - Monday, T - Tuesday, W - Wednesday, R - Thursday, F - Friday				
8/15	10/17	1/04	3/13	
0				0
01			8000 #12: CERAMICS & SCULPTURE - (167)	01
02		4200 #21: BIOLOGY - (51)		02
03	CONFLICT 3180 #30: Honors Algebra I - (157) 1140 #30: ENGLISH 9 - (154)			03
04		6120 #40: FRENCH I - (254)		04
05		2410 #50: AMERICAN GOVERNMENT - (232)		05
06	8800 #61: HEALTH - (271)			06
07		3220 #70: GEOMETRY - (226)		07
08				08

- d. The Schedule Graph is a great tool for telling which periods are open with quick glance.
- e. In the screenshot above the student has an opening All Year Period 0, 1st Semester Period 1, 2nd Semester Period 6 & All Year Period 08.
- f. The Schedule Graph is also useful for determining if the student's schedule has any conflicts.

M - Monday, T - Tuesday, W - Wednesday, R - Thursday, F - Friday				
8/15	10/17	1/04	3/13	
0				0
01			8000 #12: CERAMICS & SCULPTURE - (167)	01
02		4200 #21: BIOLOGY - (51)		02
03	CONFLICT 3180 #30: Honors Algebra I - (157) 1140 #30: ENGLISH 9 - (154)			03
04		6120 #40: FRENCH I - (254)		04

- g. The student in the above example has a conflict 3rd Period. She was scheduled into two courses this period.
- h. She has an assignment for course section 3180-30 and course section 1140-30.
- i. The Batch Scheduler will not give a student an assignment for a course section in a period where the student already has an assignment. One of these assignments was manually assigned by a user and the user chose to override the conflict.
- j. One way to double check if an assignment was manually assigned or assigned by the Batch Scheduler is to look at the **Course Section Assignments** page.
- k. On the Course Section Assignments page course 3180-30 has a **Status** of **Batch** and course 1140-30 has a **Status** of **Manual**.

	Course	Course Name	Section	Meeting ▲	Teacher	Term	Type	Status	Start Date
 	8000	CERAMICS & SCULPTURE	12	01 (167)		2nd Semester Course	Batch	Assigned	Jan 03, 2017
 	4200	BIOLOGY	21	02 (51)		All Year Course	Batch	Assigned	Aug 15, 2016
 	3180	Honors Algebra I	30	03 (157)		All Year Course	Batch	Assigned	Aug 15, 2016
 	1140	ENGLISH 9	30	03 (154)		All Year Course	Manual	Assigned	Aug 15, 2016
 	6120	FRENCH I	40	04 (254)		All Year Course	Batch	Assigned	Aug 15, 2016

- I. Conclusion: The Batch Scheduler scheduled the student into 3180-30 but the office staff scheduled the student into 1140-30 and created the conflict.

Task #13 - Run Study Hall Wizard to fill in the student's open periods with study halls



Don't run the Study Hall Wizard until all of the following conditions are met:

- ✓ You are sure the Batch Scheduler no longer needs run.
- ✓ You are satisfied with the results of the Batch Scheduler.
- ✓ You've resolved the majority of student's conflicts.
- ✓ You are ready to fill in the rest of the student's open periods with study halls.

F.Y.I.

The Study Hall Wizard will only schedule students into study halls if they have an Overall Student Status of Active and they must have at least one course request.

F.Y.I.

Student must have at least one course request or course section assignment to be scheduled into study halls by the Study Hall Wizard.

F.Y.I.

Study halls must have a course type of Z – study hall and the study hall course sections must be setup by the school. To ensure there are enough study halls to accommodate the students, users can run the R415-A, R409 and R411.

F.Y.I.

The Study Hall Wizard can be run multiple times. Unfortunately there is no easy way to clear all assignments for study halls if the Study Hall Wizard was run prematurely.

F.Y.I.

The Study Hall Wizard can be run on multiple result sets. If the school isn't sure which result set they will finalize they can run the Study Hall Wizard on both result sets. In other words, the Schedule doesn't have to be finalized in SI Options in order for the Study Hall Wizard to be run.



Make sure you are in the correct school year before proceeding. If you are scheduling for the 22/23 school year you need to have your context set to 22/23.

Also, **DO NOT** rerun the study hall wizard after the schedule is finalized. This could result in a loss of data.

The Study Hall Wizard can be accidentally run in 21/22. Be very careful and make sure you are in the correct school year before proceeding.

1. Before running the Study Hall Wizard, navigate to **StudentInformation » Management » School Administration » Scheduling Administration » Course Maintenance » Courses**.
 - a. Check each study hall to make sure it has a **Course Type** of **Study Hall**.
 - b. The **Course Type** field can be found on the **Miscellaneous** tab of each study hall.
 - c. The Study Hall Wizard only looks at **Course Type** equal to **Study Hall**.

From this screen you can display or change information regarding courses

StudentInformation > Management > School Administration > Scheduling Administration > Course Maintenance > Courses

General Marks Miscellaneous EMIS Pre/Co-requisites

SH - STUDY HALL

Department: Course Type*: Z - Study hall

Area Of Study: Language Code:

Subject Area: In Graduation / Eligibility:

Gender Directive: None

Selecting the 'Balance...' option in the Gender Directive dropdown will only affect the batch and single student schedulers. The schedulers will attempt to balance the filling percentage in the course's sections for each gender separately.

Grade Levels Available	Grade Levels Selected*
01	09
02	10
03	11
04	12
05	
06	

Location Types Available	Location Types Selected
Unknown	
Not Specified	
Library	
Gymnasium	
Music room	
Cafeteria	

Save Cancel

- d. The Study Hall Wizard can be run to look at the Grade Levels Selected on the Miscellaneous tab of the study hall. If the school would like to enforce grade levels ensure the Grade Levels Selected is properly setup for each study hall. If the school doesn't want to enforce grade levels on the study halls then there is no need to verify these fields at this time.

Note: The selected Grade Levels on the Course load into GradeBook and are used for setting up Standard Based Report Cards.
2. Now navigate to **StudentInformation » Management » School Administration » Scheduling Administration » Scheduler » Study Hall Wizard**.
3. In the *Max Consecutive Study Halls* field enter the number of study halls students are allowed to have back to back.

- a. If your school only allows students to have 2 study halls in a row enter 2 in the field.
4. In the **Section Overfill Percent** enter the amount you would like the study halls to be overfilled.
 - a. If you don't want the study halls overfilled leave the field blank.
5. Next, in the **Sort Params Sort Order** section filter on which students you would like the Study Hall Wizard to schedule first.
 - a. Multiple sort criteria can be pulled over to the right but the sort criteria is applied in order from top to bottom.
 - b. If **Grade Level ASC** is chosen SI will attempt to schedule the lowest grade level first.
 - c. If **Grade Level DESC** is chosen SI will attempt to schedule the highest grade level first.
 - d. In other words if you want the Study Hall Wizard to schedule study halls for 12th graders before scheduling the other grade levels choose **Grade Level DESC**.
 - e. If it doesn't matter which grade level gets scheduled first choose **Student Random**.
 - f. Do not select both **Grade Level ASC** and **Grade Level DESC**.
 - g. If **Student Name ASC** is chosen students with last names starting with A are scheduled before students with last names that begin with B.
 - h. If **Student Name DESC** is chosen students with last names starting with W are scheduled before students with last names that begin with T for example.
 - i. If it doesn't matter which students are scheduled first choose **Student Random**.
 - j. If **Student Number ASC** is chosen students with the lowest student numbers will be scheduled first.
 - k. Example: student #10029 will be scheduled before student #10041.
 - l. If **Student Number DESC** is chosen students with the highest student numbers will be scheduled first.
 - m. If it doesn't matter which students are scheduled first choose **Student Random**.
 - n. If **Student Schedule Priority** is chosen the Batch Scheduler will look the **Scheduling Priority** field on the Additional tab of each student's profile.
 - o. The **Scheduling Priority** field defaults to 5 upon registration and isn't a field that is commonly used in SI. This field is only used when running the Batch Scheduler or Study Hall Wizard.
 - p. Most schools will not choose to schedule study halls by **Scheduling Priority**.
 - q. If your school does choose to schedule study halls by **Scheduling Priority** you can use **SIS Student Search** to create a list of each student's scheduling priority.
 - r. Navigate to **StudentInformation** » **EZ Query** » **Reports** » **SIS Student Search** to create the list.

- s. If **Student Requesting Group** is chosen the Study Hall Wizard will attempt to schedule students who have requests for course groups before students without requests for course groups.
6. If the school would like to enforce grade levels that were selected on the **Miscellaneous** tab of each study hall put a check in the box next to **Enforce Study Hall Grade Levels**.
7. In the **Grade Levels to Schedule** pull over the appropriate grade levels to the right.
 - a. If the school would like to run the Study Hall Wizard for a grade level at a time just pull over one grade level and run the Study Hall Wizard and then repeat the process for the next grade level.
8. If the school would like to allow study halls first period put a check in the box next to **Permit First Period Study Halls**.
9. If the school would like to allow study halls before lunch place a check in the box next to **Permit Study Hall Before Lunch**.
10. If the school would like to allow study halls to be scheduled last period place a check in the box next to **Permit Last Period Study Hall**.
11. If the school would like to allow study halls after lunch, place a check in the box next to **Permit Study Hall After Lunch**.

Study Hall Wizard

From this screen, you can define the rules used by the study hall scheduler when assigning students to study halls.

Study Hall Parameters
Execute Job

Max Consecutive Study Halls:*

Section Overfill Percent:

Sort Params Sort Order:*

Student Number ASC
 Student Number DESC
 Student Schedule Priority
 Grade Level ASC

⇅
⇅
⇅
⇅

Student Random

ⓘ Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled

Enforce Study Hall Grade Levels:

Grade Levels to Schedule:

05 - 05
06 - 06
13 - 13
GR - GR

⇅
⇅
⇅
⇅

09 - 09
10 - 10
11 - 11
12 - 12

Permit First Period Study Hall Permit Study Hall Before Lunch

Permit Last Period Study Hall Permit Study Hall After Lunch

Save
Cancel
Next >

12. Click **Next** to move to the **Execute Job** tab.
 - a. Select a **Schedule** from the dropdown.
 - b. Next select a **Schedule Result** from the dropdown.
 - c. The **Schedule Job Name** field defaults to **Study Hall**. You can change the name of leave it as is.
 - d. Select any queue from the **Job Queue** dropdown. (It doesn't matter which one you select.)
 - e. Make sure you are in 22/23.
 - f. Click **Submit**.
 - g. The following message will be displayed on the screen.

Study Hall Wizard

From this screen, you can define the rules used by the study hall scheduler when assigning students to study halls.

The job was scheduled to run ✕

Study Hall Parameters
Execute Job

Schedule:*

Schedule Result:*

Schedule Job Name:*

Job Queue:*

Submit
< Back

13. Now navigate **to StudentInformation » Management » School Administration » Scheduling Administration » Scheduler » Schedule Job History** to check the status of the Study Hall Wizard job.
 - a. In the **Job Type** dropdown choose **Study Hall Batch**.
 - b. Click **Refresh Display**.

Schedule Job History

From this screen, you can view all previously run schedule jobs for the current school and school year.

Result Set: -- All -- Job Type: Study Hall Batch Job Status: -- All -- Refresh Display

Add Schedule Job

			Job Name	Schedule Result Set	Run Time	Duration (min)	Job Type	Status	Username
Stats	Job Params	Rerun Job	Study Hall	Default Schedule Result Set	08/15/2016 01:25 PM	1	Study Hall Batch	Complete	

- c. The job will be listed as **Pending** and then change to **Active**.
 - d. Click **Refresh Display** until the job says **Complete**.
 - e. Click on the Stats link.
14. The page refreshes and the **Student Study Halls Scheduled – Summary** tab is displayed.

a. The statistics summarize how many students in each grade level were assigned study halls.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Student Study Halls Scheduled - Summary		Student Study Halls Scheduled - Detail				Study Hall Constraint Test Failures
Stat Type	Scheduled Status	Grade 12	Grade 11	Grade 10	Grade 09	Total
Total Study Halls Scheduled	Students Scheduled In One or More Study Halls	132	142	129	113	516
	Students Not Scheduled In Any Study Halls	2	13	33	43	91
Percent Study Halls Scheduled	% Students Scheduled In One or More Study Halls	98.51	91.61	79.63	72.44	85.01
	% Students Not Scheduled In Any Study Halls	1.49	8.39	20.37	27.56	14.99

- b. Next click on the 2nd tab named **Student Study Halls Scheduled – Detail**.
The 2nd tab lists each student and how many study halls they received.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Scheduled Status	Study Halls Scheduled	Student Number	Last Name	First Name	Grade Level Code
Students Scheduled In One or More Study Halls	7	27275		Katherine	12
	3	13		Gregory	12
	4	99671		Garrett	12
	1	99977		Andrew	12
	3	0045		Grant	12

15. The third tab is named **Study Hall Constraint Failures** summarizes how many students were scheduled into consecutive study halls, received a study hall 1st period, received a study hall before lunch, received a study hall after lunch, or received a study hall last period.

Schedule Result Statistics

This page displays the result statistics from a scheduling job

Student Study Halls Scheduled - Summary	Student Study Halls Scheduled - Detail	Study Hall Constraint Test Failures
<p>Max Consecutive Study Halls: 107 Permit First Period Study Hall: 0 Permit Last Period Study Hall: 0 Permit Before Lunch Study Hall: 0 Permit After Lunch Study Hall: 0</p>		

16. The next screen shot is of a student's **Course Section Assignments** page.

	Course	Course Name	Section	Meeting ▲	Teacher	Term	Type	Status	Start Date
	0109	WORLD GEOGRAPHY & CULTURES	11	01 (A111)		Semester 1	Manual	Assigned	Aug 24, 2016
	0116	POLITICAL TRENDS	12	01 (A200)		Semester 2	Manual	Assigned	Jan 04, 2017
	0035	CP HUMAN ANATOMY	21	02 (A159)		Semester 1	Batch	Assigned	Aug 17, 2016
	0189	FITNESS AWARENESS	22	02 (A174)		Semester 2	Batch	Assigned	Jan 04, 2017
	0205	INTRO TO GUITAR	31	03 (A189)		Semester 1	Batch	Assigned	Aug 17, 2016
	0182	FITNESS	32	03 (GYM)		Semester 2	Batch	Assigned	Jan 04, 2017
	SH41	STUDY HALL	41	04 (CAFE)		Semester 1	Batch	Assigned	Aug 17, 2016
	SH42	STUDY HALL	42	04 (CAFE)		Semester 2	Batch	Assigned	Jan 04, 2017
	0025	ENGLISH COMPOSITION I	51	05 (A102)		Semester 1	Batch	Assigned	Aug 17, 2016

- The student was scheduled into two study halls.
- The student still has a couple of open periods. The **Schedule Graph** on the Request Assignments page is an excellent tool in determining which periods the student has open at a glance.

c. The student has Periods 8 and 9 open all year.

M - Monday, T - Tuesday, W - Wednesday, R - Thursday, F - Friday				
8/17	10/18	10/4	3/13	
01	0111 #11: PSYCHOLOGY I - (A200) 0109 #11: WORLD GEOGRAPHY & CULTURES - (A111)	0109 #11: WORLD GEOGRAPHY & CULTURES - (A111)	0116 #12: POLITICAL TRENDS - (A200)	01
02	0035 #21: CP HUMAN ANATOMY - (A159)		0189 #22: FITNESS AWARENESS - (A174)	02
03	0205 #31: INTRO TO GUITAR - (A189)		0182 #32: FITNESS - (GYM)	03
04	SH#1 #41: STUDY HALL - (CAFE)		SH#2 #42: STUDY HALL - (CAFE)	04
05	0025 #51: ENGLISH COMPOSITION I - (A102)		0028 #52: ENGLISH COMPOSITION II - (A102)	05
06	0116 #61: POLITICAL TRENDS - (A108) SH#1 #61: STUDY HALL - (CAFE)	0116 #61: POLITICAL TRENDS - (A108)	0054 #62: FORENSICS - (A164)	06
07	0082 #73: ALGEBRA III - (A220)			07
08				08
09				09
10	ADVIS #41: ADVISORY Wed. 12:07-12:43 - Platton (A164)			10

d. The school could also run the **R415 Student Scheduled With Free Time** report that will list any open periods the student has.

Task #14 - Print Schedule Cards (R701)

Custom R701 formats aren't currently available.

- To print Schedule Cards navigate to **StudentInformation** » **SIS** » **Scheduling** » **Scheduling Reports** » **Schedule Card Formatter (R701)**.
- In the Report Layout dropdown, select a format. The following table will guide you in your format selection.
Note: The Print Two Students Per Page option is on formats 2, 3, 12, 13, 22, and 23.

Format	Orientation	Print Request Status?	Print Locker or Combo?	Print Fees?	Notes
1	Landscape	Yes	Yes –no combo	No	- Only format to print request status - When printing, choose Page Scaling = Fit to Printable Area
2	Portrait	No	Yes –no combo	No	
3	Portrait	No	Yes (both)	No	- Very similar to format 2; smaller print - Prints student number
4	Landscape	No	Yes –no combo	No	- 2 schedule cards for the same student per page - Prints student SSN
5	Landscape	No	Yes –no combo	No	- 2 schedule cards for the same student per page - Very similar to format 4 except for placement of several small items
6	Landscape	No	Yes (both)	Yes	- Can project fees if fees haven't been assigned - Prints program

***Note on Format 6:** Font size is 8.5 and will accommodate 17 assignments on a single page with default margins of 0.4. For students with 17 assignments (or more), the common text will print on the 2nd page. A single page can accommodate more assignments by reducing the top and bottom margins or using the Adobe Page Scaling setting of "Fit to Printable Area" or "Shrink to Printable Area".

11					Same as format 1
12	Portrait	No	Yes (both)	No	- Similar to format 2 - Prints program - Does not print gender or homeroom
13					Same as format 3
14					Same as format 4
15					Same as format 5
16	Landscape	No	Yes (both)	Yes	- Can project fees if fees haven't been assigned

					- Very similar to format 6 - Prints student SSN
21					Same as format 1
22					Same as format 2
23					Same as format 3
24					Same as format 4
25					Same as format 5
26					Same as format 6
27					Similar to format 13 - Footer contains school's return address and parent's mailing address for use with self sealing paper (mailer)

- Next, select a **Schedule** and **Schedule Result** from the dropdowns.
- Select the desired filters for grade level, course terms, etc.
- To print Schedule Cards to hand out to students choose the following parameters.


Suppress Requests That Have No Matching Assignment: Yes No

Position For Requests That Have No Matching Assignment: ▾

Suppress Results That Have No Assignment: Yes No

Position Of Results That Have No Assignment: ▾

Print Only Schedules With Results That Have No Assignment: Yes No

Print Schedules Changed After Date: 

- To print Schedule Cards to show all the requests the Batch Scheduler assigned and the requests the Batch Scheduler attempted to assign but couldn't choose the following parameters.


Suppress Requests That Have No Matching Assignment: Yes No

Position For Requests That Have No Matching Assignment: ▾

Suppress Results That Have No Assignment: Yes No

Position Of Results That Have No Assignment: ▾

Print Only Schedules With Results That Have No Assignment: Yes No

Print Schedules Changed After Date: 

- To print Schedule Cards to see which students have unapproved requests choose the following parameters.


Suppress Requests That Have No Matching Assignment: Yes No

Position For Requests That Have No Matching Assignment: ▾

Suppress Results That Have No Assignment: Yes No

Position Of Results That Have No Assignment: ▾

Print Only Schedules With Results That Have No Assignment: Yes No

Print Schedules Changed After Date: 

8. To print Schedule Cards for only students who still have unfulfilled requests choose the following parameters.
 - a. Note the Schedule Cards can be run with this option before the Batch Scheduler is even executed.


Suppress Requests That Have No Matching Assignment: Yes No

Position For Requests That Have No Matching Assignment: ▾

Suppress Results That Have No Assignment: Yes No

Position Of Results That Have No Assignment: ▾

Print Only Schedules With Results That Have No Assignment: Yes No

Print Schedules Changed After Date: 

Note: As of StudentInformation 16.0.0, the Load Settings tab has the option to select **Private** to make the report unavailable on the I Want To ... menu or select **Available In "I Want To" Menu** to list the report on the the I Want To ... menu. This setting cannot be changed. The report must be deleted and re-created to change the privacy setting.

Schedule Card Formatter (R701)

From this screen, you can select parameters to generate a report.

Selection Criteria
Selection Summary
Load Settings

Name	Private	Available In "I Want To" Menu	Creator	Date Created
format 3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Recker, Amy (amy.recker)	Aug 04, 2016

Default Settings On Startup: ▾

Current Settings

Name: *

Private:

Available In "I Want To" Menu:

Appendix A: - How to schedule one grade level at a time updating the same schedule result set each time.

1. Follow the steps in **Task #4 Configure Batch Scheduler job parameter to schedule the entire school** except in **step #6a** in the **Grade Levels to Schedule** filter pull over the grade level you would like to schedule first.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters | Pass Level Parameters | Pass Control | Course Sequencing Rules | Teacher Link Groups | Submit

Grade Levels to Schedule:*
05 - 05
06 - 06
07 - 07
08 - 08

Course Terms to Schedule:*
1st Semester Course
2nd Semester Course
All Year Course

Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled.

Sort Criteria for Students who are being Scheduled:*

Student Number ASC
Student Number DESC
Student Schedule Priority
Grade Level DESC

Student Requesting Group
Student Random

Section Overfilled Percent: 5

Course Group Locking: Honor Course Group Locks

Balance By Ethnicity: No Balancing

Note: The Time Limit Per Student value determines the maximum number Of seconds that the scheduler will Try To schedule Each student.

Time Limit Per Student:* 60

Next >

- a. Continue on with the remainder of the steps in **Task #4**.
2. Now, follow the steps in **Task #5 Run the Batch Scheduler** except in **step #8** SI State Support recommends naming the Schedule Job Name **One grade at a time**.
 - a. Continue following the remainder of the steps in **Task #5 Run the Batch Scheduler**.
 3. Follow all steps in **Task #6 Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules**.
 4. Run the Batch Scheduler for the same grade level again if needed until the desired results for that grade level are achieved.
 5. After the Batch Scheduler has completed and the student's schedules are the way you want them you can now schedule another grade level.
 6. Follow the steps in **Task #5** again except before clicking on the **Execute Job and Update Existing Schedule Result** in step #2 click on the **Edit Pencil icon** to edit the job parameter set.
 - a. In the **Grade Levels to Schedule** filter clear the filter and select the next grade level to be scheduled.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters Pass Level Parameters Pass Control Course Sequencing Rules Teacher Link Groups Submit

Grade Levels to Schedule:*

09 - 09	↕	↔	11 - 11
10 - 10	↕	↔	
12 - 12	↕	↔	
13 - 13	↕	↔	

Course Terms to Schedule:*

	↕	↔	1st Semester Course
	↕	↔	2nd Semester Course
	↕	↔	All Year Course

Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled.

Sort Criteria for Students who are being Scheduled:*

Student Number ASC	↕	↔	Student Requesting Group	↕
Student Number DESC	↕	↔	Student Random	↕
Student Schedule Priority	↕	↔		
Grade Level DESC	↕	↔		

Section Overfilled Percent:

Course Group Locking: **Balance By Ethnicity:**

Note: The Time Limit Per Student value determines the maximum number Of seconds that the scheduler will Try To schedule Each student.

Time Limit Per Student:*

Next > Cancel

- b. After the Batch Scheduler has completed and the student's schedules are the way you want them you can now schedule another grade level.
7. Now go edit the job parameter again and clear out the filter and select the next grade level to be scheduled.
8. Continue the process until all the desired grade levels have been scheduled.

Appendix B - How to run the Batch Scheduler creating a new result set each time.



This method is more complicated than it appears and extreme caution is advised before attempting to schedule using this method.



When it comes time to finalize the 22/23 schedule, only one schedule result set can be chosen from the dropdown in SI Options.

1. Complete Tasks 1-6 in this checklist.
2. Once you are ready to run the Batch Scheduler for the 2nd time navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Scheduler** » **Job Parameter Sets**.
3. Click on the 4th icon **Execute Job and Create New Schedule Result** of the job parameter you wish to rerun.
 - a. You will be brought to the Submit tab.
 - b. In the **Master Schedule** dropdown choose a master schedule. Most schools will only have one master schedule in the dropdown.
 - c. In the **New Schedule Result Name** field enter a descriptive name that will help you and other users remember which schedule result set is the latest and greatest.
 - d. Some suggested names are **2nd try all grades, added 1 sec of 1912**, or **Add Art1 2/12 9:29**.
 - e. The more descriptive you are with the **Schedule Result Name** the less likely you another user will accidentally pick the wrong one and begin making schedule changes on the wrong result set.
 - f. Enter an optional description in the **New Schedule Result Description**.
 - g. Since we have already run the Batch Scheduler once we have the option of copying the results from the first run into the 2nd run.
 - h. In the **Copy from Existing Schedule Result Set** dropdown choose the schedule result you created in the first run.

- i. Now you have the option of which course section assignments from the result set you want to copy to the new result set.
- j. SI State support recommends only choosing to place a checkbox in **Copy Schedule Results Created Manually**.
- k. By choosing to copy the results that were scheduled manually the new schedule result set will contain all the assignments with a **Type of Manual** from the original result set. This means any assignment that was directly added to a student's schedule and any request that was manually turned into an assignment will be copied to the new result set.
- l. If **Copy Schedule Results Created by the Batch Scheduler** is checked all the course section assignments with the **Type of Batch** will be copied to the new result set. SI State Support recommends leaving this option unchecked.
- m. If **Copy Schedule Results Created by the Single Student Scheduler** is checked all course sections assignments with the **Type of Online** will be copied to the new result set. SI State Support recommends leaving this option unchecked.

	Course	Course Name	Section	Meeting ▲	Teacher	Term	Type	Status	Start Date
	4010	MODERN WORLD HISTORY	1	1 (134)		All Year Course	Online	Assigned	Aug 29, 2016
	HR	HOMEROOM	39	HR (204)		All Year Course	Manual	Assigned	Aug 29, 2016
	0263	LEISURE GAMES & ACTIVITIES	3	2 (GYM)		1st Sem	Manual	Assigned	Aug 29, 2016
	7513	CAREER & LIFE PLANNING	2	2 (108)		2nd Sem	Manual	Assigned	Jan 23, 2017
	9210	SCULPTURE & CERAMICS I	2	3 (110)		All Year Course	Online	Assigned	Aug 29, 2016
	2120	CP MATH I	1	3 (203)		All Year Course	Batch	Assigned	Aug 29, 2016
	LUNCH1	LUNCH TERM 1	4	4 (159A)		1st Sem	Batch	Assigned	Aug 29, 2016

- n. In the **Schedule Job Name** field enter a descriptive name. SI State Support recommends just copying the same name you entered in the **New Schedule Result Name** in step #3c above.

Schedule Job Wizard

From this screen, you can run the Scheduler

Run Level Parameters
Pass Level Parameters
Pass Control
Course Sequencing Rules
Teacher Link Groups
Submit

Master Schedule:* Default Schedule

New Schedule Result Name:* 2nd run 2/12 11:20

New Schedule Result Description:

Copy from existing Schedule Result set:

Default Result Set

Copy Schedule Results Created Manually

Copy Schedule Results Created by the Batch Scheduler

Copy Schedule Results Created by the Single Student Scheduler

Schedule Job Name:* 2nd run 2/12 11:20 Job Queue:* EMST - EMIS Transfer

Execute Schedule Job
< Back
Cancel

- o. In the **Job Queue** dropdown select a queue. It doesn't matter which one you select.
 - p. Click **Execute Schedule Job**.
- 4. Now, follow the steps in **Task #8 Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules**.
- 5. When you are finished making adjustments to the master schedule and requests and are ready to rerun the Batch Scheduler by following steps 2, 3, and 4 again of **Appendix B** until you achieved the desired scheduling results.
- 6. Once you are satisfied with results of the Batch Schedule and wish to start making manual adjustments to student's schedules continue on with **Tasks #10-13** to finish out the scheduling process.

Appendix C - How to run the Batch Scheduler for one grade level at a time creating a new result set each time.



This method is more complicated than it appears and extreme caution is advised before attempting to schedule using this method.

Reminder!

When it comes time to finalize the 22/23 schedule only one schedule result set can be chosen from the dropdown in SI Options.

Reminder!

Please make sure you do not create a separate result set for each grade level. Please make sure you are copying the results from a previous run to the new run.

The Key to Success: If you are choosing to schedule one grade level at a time and create a new result set each time the key to success is to schedule one grade level, then schedule the next grade level and copy the scheduling results from the 1st grade level to the 2nd grade level. Once you've achieved the desired results with the 2nd grade level then schedule the 3rd grade level and copy the scheduling results from the result set that has the first two grade levels combined and so on.

1. Complete Tasks 1-3 in this checklist.
2. Follow the steps in **Task #4 Configure Batch Scheduler job parameter to schedule the entire school** except in **step #6a** in the **Grade Levels to Schedule** filter pull over the grade level you would like to schedule first.

Schedule Job Wizard

From this screen, you can save Job Parameter Sets for the Scheduler

Run Level Parameters
Pass Level Parameters
Pass Control
Course Sequencing Rules
Teacher Link Groups
Submit

Grade Levels to Schedule:*

05 - 05 06 - 06 07 - 07 08 - 08	12 - 12
--	---------

Course Terms to Schedule:*

	1st Semester Course 2nd Semester Course All Year Course
--	---

Note: Sort Criteria chosen in the right list box, are applied in order from top to bottom, when ordering the students who are to be Scheduled.

Sort Criteria for Students who are being Scheduled:*

Student Number ASC Student Number DESC Student Schedule Priority Grade Level DESC	Student Requesting Group Student Random
--	--

Section Overfilled Percent:

Course Group Locking: Balance By Ethnicity:

Note: The Time Limit Per Student value determines the maximum number Of seconds that the scheduler will Try To schedule Each student.

Time Limit Per Student:

3. Continue on with the remainder of the steps in **Task #4**.
4. Complete the steps in **Task #5 Run the Batch Scheduler** and **Task #6 Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules**.
5. Once you are ready to run the Batch Scheduler for the 2nd time navigate to **StudentInformation » Management » School Administration » Scheduling Administration » Scheduler » Job Parameter Sets**.
 - a. Click on the Edit Pencil icon of the job parameter you ran previously.
 - b. On the **Pass Level Parameters** tab clear out the **Grade levels to Schedule** filter and pull over the next grade level to the right that you want to schedule.
 - c. Now flip to the **Submit** tab and click **Save Schedule Parameter**.
 - d. The page will refresh and you will be brought back to the **Job Parameter Sets** page.
6. Click on the 4th icon **Execute Job and Create New Schedule Result** of the job parameter set you just edited.
 - a. You will be brought to the **Submit** tab.
 - b. In the **Master Schedule** dropdown choose a master schedule. Most schools will only have one master schedule in the dropdown.

- c. In the **New Schedule Result Name** field enter a descriptive name that will help you and other users remember which schedule result set is the latest and greatest.
- d. Some suggested names are **12 + 11 1st try, 11th and 12th #1, or add 11th to 12th**
- e. The more descriptive you are with the **Schedule Result Name** the less likely you another user will accidentally pick the wrong one and begin making schedule changes on the wrong result set.
- f. Enter an optional description in the **New Schedule Result Description**.
- g. Since we have already run the Batch Scheduler once we have the option of copying the results from the first run into the 2nd run.
- h. In the **Copy from Existing Schedule Result Set** dropdown choose the schedule result you created in the first run.
- i. Now you have the option of which course section assignments from the original result set you want to copy to the new result set.
- j. Since all the course section assignments for the first grade level are contained in the first result set we would want to put a check in all three boxes.
- k. **Copy Schedule Results Created Manually** will copy all assignment with a **Type** of **Manual**. This means any assignment that was directly added to a student's schedule and any request that was manually turned into an assignment will be copied to the new result set.
- l. **Copy Schedule Results Created by the Batch Scheduler** will copy all the course section assignments with the **Type** of **Batch** to the new result set.
- m. **Copy Schedule Results Created by the Single Student Scheduler** will copy all course sections assignments with the **Type** of **Online** to the new result set.

	Course	Course Name	Section	Meeting ▲	Teacher	Term	Type	Status	Start Date
	4010	MODERN WORLD HISTORY	1	1 (134)		All Year Course	Online	Assigned	Aug 29, 2016
	HR	HOMEROOM	39	HR (204)		All Year Course	Manual	Assigned	Aug 29, 2016
	0263	LEISURE GAMES & ACTIVITIES	3	2 (GYM)		1st Sem	Manual	Assigned	Aug 29, 2016
	7513	CAREER & LIFE PLANNING	2	2 (108)		2nd Sem	Manual	Assigned	Jan 23, 2017
	9210	SCULPTURE & CERAMICS I	2	3 (110)		All Year Course	Online	Assigned	Aug 29, 2016
	2120	CP MATH I	1	3 (203)		All Year Course	Batch	Assigned	Aug 29, 2016
	LUNCH1	LUNCH TERM 1	4	4 (159A)		1st Sem	Batch	Assigned	Aug 29, 2016

- n. In the **Schedule Job Name** field enter a descriptive name. SI State Support recommends just copying the same name you entered in the **New Schedule Result Name** in step #6c above.
- o. In the **Job Queue** dropdown select a queue. It doesn't matter which one you select.
- p. Click **Execute Schedule Job**.

Schedule Job Wizard

From this screen, you can run the Scheduler

Run Level Parameters	Pass Level Parameters	Pass Control	Course Sequencing Rules	Teacher Link Groups	Submit
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Master Schedule:*	Default Schedule	
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New Schedule Result Name:*	add 11th graders to 12th grade result set	Copy from existing Schedule Result set:	i Check one or more of the boxes below, in order to copy assignments from the existing Schedule Result set chosen in the dropdown at left, to the new Schedule Result set
New Schedule Result Description:		Default Result Set	
		<input checked="" type="checkbox"/> Copy Schedule Results Created Manually	
		<input type="checkbox"/> Copy Schedule Results Created by the Batch Scheduler	
		<input type="checkbox"/> Copy Schedule Results Created by the Single Student Scheduler	

Schedule Job Name:*	11th graders to 12th grade result set	Job Queue:*	Gen - Generic
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Execute Schedule Job	< Back	Cancel
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- Now follow the steps in Task #8 **Review Batch Scheduler statistics and run reports to help resolve conflicts and verify schedules.**
- When you are finished making adjustments to the master schedule and requests and are ready to rerun the Batch Scheduler by following steps 5 and 6 again of **Appendix C** until you achieved the desired scheduling results.
- Once you are satisfied with results of the Batch Scheduler and wish to start making manual adjustments to student's schedules continue on with **Tasks #10-13** to finish out the scheduling process.

Appendix D - How to create multiple master schedules and run the Batch Scheduler for multiple master schedules.



This method is more complicated than it appears and extreme caution is advised before attempting to schedule using this method.

Why would you want to create multiple master schedules?

Example: Your school has a levy on the ballot in May. The district is not sure if the levy will pass or not. If the levy doesn't pass the district will need to lay off 5 teachers and eliminate 30 course sections. The first master schedule would contain all the course sections if the levy passes and the school could schedule students using the Batch Scheduler or manually using the 1st master schedule and result set. The 2nd master schedule wouldn't contain the 30 course sections that will be eliminated if the levy doesn't pass. The school could schedule students using the Batch Scheduler or manually using the 2nd master schedule and result set.

1. To create a 2nd master schedule navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Initialization** » **Master Schedule**.
 - a. Click the double paper icon of the **Default Schedule** to copy the schedule.
 - b. The **Name** field defaults to **Copy of Default Schedule**.
 - c. SI State Support recommends changing the name to be more descriptive. Example: **Schedule if levy doesn't pass**.
 - d. Click **Save**.
 - e. Change the wording in the Description field to match the new name of the master schedule.
 - f. Leave the **Copy Result Set** dropdown empty.
 - g. In the **Copy Options** section choose to copy **Course Sections** and **Course Group Sections**.
 - h. Click **Save**.

2. Next we will delete the 30 course sections that are being eliminated if the levy doesn't pass.
 - a. Navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Course Maintenance** » **Course Sections**.
 - b. In the **Working Schedule** dropdown select the master schedule named **Schedule if levy doesn't pass**.
 - c. Click **Reload Screen** and **Search**.
 - d. Inactivate the course sections that are being eliminated by editing the course section and removing the checkmark from the **Is Active** box.
3. Now we are ready to run the Batch Scheduler on both master schedules.
4. Follow **Tasks #1-13** for each master schedule.

Appendix E - How to clean out assignments made by the Batch Scheduler but leave the manual assignments.

Occasionally schools would like to start over and delete all assignments created by the Batch Scheduler but keep all the assignments the office staff created manually.

1. In 22/23 at the building level, navigate to **StudentInformation** » **Management** » **School Administration** » **Scheduling Administration** » **Scheduler** » **Job Parameter Sets**.
2. Click the Edit Pencil icon of the job parameter you have been working with.
 - a. In the **Grade Levels to Schedule** filter move all grade levels over to the left to clear out the filter.
 - b. Move a grade level which wouldn't have any requests over to the right. Examples: GR, UG, IN, and 23.
 - c. Click on the **Submit** tab
 - d. Click **Save Schedule Parameter**.
3. Next click on the 4th icon **Execute Job and Create New Schedule Result** icon of the job parameter you just edited.
 - a. You will be brought to the **Submit** tab.
 - b. In the **Master Schedule** dropdown choose a master schedule. Most schools will only have one master schedule in the dropdown.
 - c. In the **New Schedule Result Name** field enter a descriptive name. Example: **New result set**.
 - d. In the **Copy from Existing Schedule Result Set** dropdown choose the schedule result set which contains all the course section assignments created manually and by the Batch Scheduler.
 - e. Place a check in the box next to **Copy Schedule Results Created Manually**.
 - f. This will copy all the assignments the office staff hand entered but since we aren't checking either of the other options the assignments created by the Batch Scheduler or Single Student Scheduler will not be copied.
 - g. In the **Schedule Job Name** field enter the same name you used in step #3c. which is **New Result Set**.
 - h. In the **Job Queue** dropdown select any queue.
 - i. Click **Execute Scheduler Job**.
4. Wait for the job to finish and then go to a student's Request Assignments page and choose the new schedule result in the dropdown.
 - a. You'll notice all the student's requests are still there but only the assignments that were entered manually are still scheduled.
5. Now go edit the job parameter again and clear the grade levels filter and pull the appropriate grade levels that you want to schedule over the right again.
 - a. Flip to the **Submit** tab and click **Save Schedule Parameters**.
6. Follow **Tasks #5-13** to finish scheduling.