Aeries®
Student Information System

Next Year Scheduling for Secondary Schools

SAN BERNARDINO CITY
UNIFIED SCHOOL DISTRICT
Information Technology Department

Revised: September 19, 2019

Table of Contents

Changes to this manual

03/07/2019

- Information for the Preschedule Edit Listing Report – Chapter 3, Section 2
- Added chapter numbers in the headers

Training and Support

Login Issues securityspecialist@sbcusd.com	Security Specialist (909) 386-2550
Technical Support for computers and peripherals helpdesk@sbcusd.com	Help Desk (909) 888-4357
Training and Documentation techtraining@sbcusd.com	Training Specialists (909) 386-2550
Reports reports@sbcusd.com	Reports Team (909) 386-2550

Aeries (Eagle Software) Training Videos
http://www.aeries.com/training-support/support-videos **SUPPORT VIDEOS** for **Scheduling**

Course Catalog To print: go to Aeries>Query>Load>Catalog in the Filter field	Secondary Education (909) 473-2077

If you need to report incorrect information from the Course Catalog, contact the Secondary Education department at (909) 473-2077.

Chapter 1 - Overview of Scheduling Master

Topics covered in this chapter:

--Overview of Scheduling Master Schedule

--Scheduling Master Schedule Process Flow

Overview of Scheduling Master Schedule (SMS)

This manual contains step-by-step instructions for the Scheduling Master Schedule procedure. ***Scheduling Master Scheduling*** *is scheduling students for next year or next semester while still in the current year's database. E.g., working in 2018-19 database for the 2019-2020 school year.*

It also includes the steps for ***Master Scheduling****. Master Scheduling is for the current year's schedule.*

1st Semester or Trimester Scheduling Master Schedule (SMS)

The steps to begin working on next year's Scheduling Master Schedule commence around February. Refer to the flow chart on the next page for a summary of what happens and in what order. This manual provides step-by-step instructions for each box shown in the flow chart.

All scheduling activities occur in the Aeries **Scheduling Process > Scheduling Master (SMS)** or **SMS Board** screen and begin while in the current year's database. You are scheduling for the next school year. After promotions have been run (student grades and other information are promoted for the next school year) all Scheduling Master activities will still occur in the SMS screens.

After all schools have ended for the summer break and you notify Information Technology that your new year's database is ready to roll-into the next year's database, your newly created database is your **Master Schedule (MST)** and from this point forward you will continue all your scheduling in the MST screens.

HIGH SCHOOLS 2nd Semester Scheduling Master Schedule (SMS)

If you have 1st and 2nd Semester Classes that you want to automatically roll (e.g., Int. Math 1A and then to Int. Math 1B), the 1st Semester Course you give to the student(s) will need to have the Next Course filled in properly. If you have questions regarding this, call Secondary Ed for assistance.

CrsID#	Title	Long Title	N/H	Coll Prep	AcaWt	Low Grd	High Grd	Default Credit	Max Credit	Status
M233	Int. Math 1A	CCSS Integrated Mathematics 1A		P	0	8	12	5.00	10.00	- Active

Subject Area Codes			Dept	Term	Content Group	NCES Code	Next Course	Trm Seq	Yr Seq	Exc	(Core/Prof)	PE	T/A	Next Yr Status
M			M	S			M234	0	0			☐	☐	- Active

Counselors will need to use SMS to manually edit student schedules for 2nd semester classes that do not use the procedure mentioned above and for undoing student schedules that you do not want changing to the Next Course as above.

When the 2nd semester Scheduling Master (SMS) is ready to become your Master Schedule (current), contact Information Technology and ask them to create the 2nd semester Master Schedule (MST).

Scheduling Master Schedule Process Flow

Phase 1 – Course Requests • ***Decide what Courses to offer*** • ***Give Course Request form to students if you will be auto scheduling*** • ***Initialize Scheduling Master Tables*** • ***Enter Course Requests for each student*** • ***Run reports to check for accuracy*** ***Refer to Chapter 2 – Enter Course Requests***	***Phase 2 – Create Sections*** • ***Add single sections*** • ***Add double sections*** • ***Add triple sections*** • ***Add remaining sections*** • ***Run reports to check for accuracy*** ***Refer to Chapter 3 – Create Sections***
Phase 3 – Schedule Students • ***Run Auto Scheduler if auto scheduling students*** • ***Manually add Courses to students*** • ***Run reports to check for accuracy*** • ***Solve Balance issues*** • ***Solve Conflict issues*** • ***Solve Reject issues*** • ***Notify IT that you are finished and the Scheduling Master is ready to roll over to your Master Schedule*** ***Refer to Chapter 4 – Schedule Students***	***Phase 4 – Finishing Touches*** • ***In your new Master Schedule*** • ***Revise student schedules and add new students*** • ***Print Student Schedules*** • ***Print Class Lists*** ***Refer to Chapter 5 – Finishing Touches***

Scheduling Master Schedule Reports Flow Chart

Phase 1 – Before you begin entering Course Requests

- **District's Course Catalog for Middle or High School**
  (Chapter 2, Section 4)

- **Current Year's Master Schedule**
  to see what courses, scheduling groups, and how many sections you are currently utilizing.
  (Chapter 2, Section 1)

- **Incoming Student Query**
  so you make sure your total student count is correct (Chapter 2, Section 5)

Phase 2 – After you enter Student Course Requests

- **Student's with duplicate course requests**
  (Chapter 2, Section 5)

- **Students With No Course Requests** or **More or Less Than N Course Requests**
  (Chapter 2, Section 5)

- **Students Course Requests Query by Grade and Course**
  based on a specified Course. (Chapter 2, Section 5)

- **Students With No Course Requests**
  (Chapter 2, Section 5)

- **Scheduling Reverse Verification Listing**
  is a list by student that will help you identify bad data so you can correct it before creating sections. (Chapter 2, Section 5)

- **Scheduling Course Request Listing**
  will show what courses you have assigned students (who). (Chapter 2, Section 5)

- **Scheduling Course Request Tally**
  will show you how many students have signed up for specific courses (not who). This count is how you know how many sections to create. (Chapter 2, Section 5)

- **Scheduling Course Request Letter to Parent**
  to let parent know what courses the student will have. (Chapter 2, Section 5)

Phase 3 – After you create Sections

- **Scheduling Conflict Matrix**
  (if using Auto Scheduler) will show rejects if ran now. (Chapter 3, Section 2)

- **Scheduling Master Schedule Error**
  shows sections in a list so you can review for errors.
  (Chapter 3, Section 2)

- **Scheduling Master Schedule** (Chapter 3, Section 2)
  shows sections in a list with period, teacher and room.

- **Scheduling Master Schedule Board** (Chapter 3, Section 2)
  shows teachers and their period sections.

- **Prescheduling Edit Listing** (Chapter 3, Section 2)
  Shows who will not be scheduled when you run auto scheduler and why.

- **Scheduling Course Request Analysis**
  lists the courses, total course requests and total seats based on the sections you created. Also good after you run Auto Scheduler to show who had rejects. (Chapter 3, Section 2)

Phase 4 – After you Schedule Students

- **Troubleshooting Error Message**
  (if using Auto Scheduler) will show you rejection reasons. (Chapter 4, Section 1)

- **Scheduling Class Load Analysis**
  verifies class sizes (Chapter 4, Section 2)

- **Scheduling Class Load Averages**
  shows balance of males, females and grade levels. (Chapter 4, Section 2)

- **Scheduling Reject Analysis Listing**
  lists students that did not get fully scheduled. (Chapter 4, Section 2)

- **Students with Double Periods**
  lists students with more than one section in same period. (Chapter 4, Section 2)

- **Students with Incomplete Class Schedules**
  (Chapter 4, Section 2)

- **Students with more or less Than N Periods**
  (Chapter 4, Section 2)

- **Scheduling Master Schedule**
  (Chapter 4, Section 2)

- **Print Student Schedules**
  (Chapter 5, Section 5)

- **Print Class List by Section or Teacher**
  (Chapter 5, Section 6)

Chapter 2 – Enter Course Requests

Topics covered in this chapter:

Section 1: Decide what courses you are going to offer

Section 2: Give course request form to students (if auto scheduling)

Section 3: Initialize tables to begin the Scheduling Master Schedule process

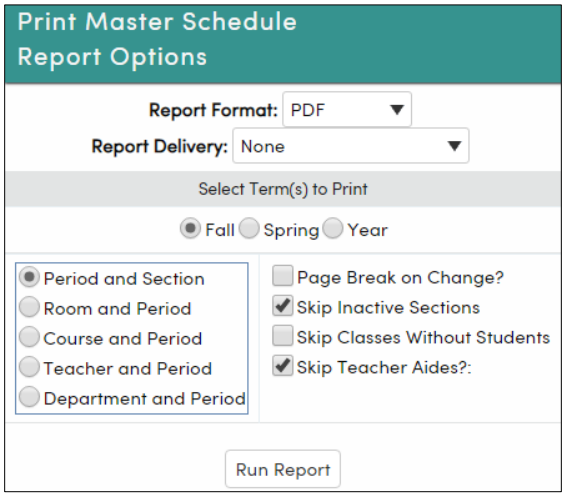
Section 4: Collect and enter course requests (if auto scheduling)

Section 5: Course Requests Queries and Reports

Section 1 – Decide what courses you are going to offer

You may want to print the current year's Master Schedule and use the printout to mark the changes you want to make in next year's Master Schedule. If you do, follow the steps in this section to print the current year's Master Schedule. To get a listing of all incoming students, see Section 5.

1. Login to **Aeries**.
2. In the Navigation Tree, click on the **Reports** icon
3. Type **Master** in the Filter Reports…. field.
4. Click on **Master Schedule** from the list.
5. In the **Report Format** field, select PDF from the drop-down list.
6. In the **Report Delivery** field, select the desired option from the drop-down list (e.g., None, Email with attachment).
7. From the **Select Term(s) to Print** area, select the Term you will be reviewing for next year.
8. Select the desired sort option (if you use Period and Section, you will see Scheduling Groups).
9. In the additional options area (right side), select the desired option(s) (e.g., Page Break on Change, Skip Inactive Sections).



10. Click the **Run Report** button.
11. At the **Report Viewer** dialog box, click **View Report** to display the report.

TEST ARROYO VALLEY HIGH SCHOOL 8/7/2018

2018-2019 **MASTER SCHEDULE BY PERIOD and SECTION** Page 1

Sec#	Pd-Bl	Sm	Days	Crs ID	Course Title	Dpt	TN	Teacher Name	Room	CR	SX	LO	HI	MX	Tot	Boys/Pct	Girls/Pct	Sch Grp	Crs Grp	Tm Nm	Sm Grp	T/A
1	0	F	MTWTF	Z100	Attendance Hold		84	Shelton,Mary	OFF	0.0	9	12	30	1	1	100.0 0	0.0					
2	0	F	MTWTF	O601	Acad Skills A	J	88	Wright,Gerry	H107	5.0	9	12	40	4	2	50.0 2	50.0					
8700	0	F	MTWTF	O127	Peer Tutor	J	84	Shelton,Mary	OFF	5.0	9	12	2	0	0	0						

Totals: **Seats: 72** **Students: 5** **Class Average: 2.5** **Boys: 3** **Pct: 60.0** **Girls: 2** **Pct: 40.0**

12. **Print** if you want a hard copy of this report.
13. Close the **PDF** and **View Report** windows.
14. Mark all the changes you are going to make on the printout to next semester's or year's schedule with a red pen.

Section 2 – Give course request form to students

If you are going to Auto Schedule your students, give your student's the Course Request form.

1. If you are going to use Auto Scheduler to schedule your students, distribute the Course Request form to your current students with instructions on how to complete the form, when it needs to be returned, and where to return the completed form (e.g., Counseling office or teacher).

Before going any further, run this query to verify all your students have the correct Next Grade:

LIST STU NM ID GR NG BY NG

Look for incorrect and blank next grades.

Section 3 – Initialize SSS/SMS tables

To begin the Scheduling Master Schedule process, you will need to create a Scheduling Master so that students can be scheduled into next year's sections. This newly created database is completely separate and does not change anything in your current Master Schedule. It is important that you understand the difference between:

- ***Scheduling Master Schedule*** *(SMS) is the process of creating student classes for the up and coming semester or year*
- ***Master Schedule*** *(MST) is for use right now. This is where the student's current classes reside.*

☝ Contact Information Technology at (909) 386-2550 and ask them to perform these steps for you.

💣 If you see the **Scheduling tables are inactive** message (Scheduling Process > Scheduling Master), it means that the SSS and SMS tables have not been initialized. Call IT.

Aeries Scheduling Tables

SSS	Student Scheduling System (course requests for next year)
SMS	Scheduling Master Schedule (next year's master schedule)
MST	Master Schedule (current year)
SEC	Student Schedules (current year)

Section 4 – Collect and enter Course Requests

*If you plan to **Auto Schedule students**, make sure there is a course request for every enrolled student in your school for next year. You will mass add the most common courses and manually add or change the exceptions. The auto scheduler will take each course request and attempt to schedule students into their requested courses.*
*If you plan to **manually schedule** all of your students, then you do not need to enter course requests. You can skip to Chapter 3 – Create Sections.*

Before completing the steps in this guide, have the head counselor or ACII at your school contact the Information Technology department and ask to have your SSS and SMS tables initialized. You will decide if you want anything copied over to your new Master Schedule (e.g., courses, sections)

You must have the proper Aeries security to be able to perform some of the steps in this manual. Contact the IT Security Specialist at securityspecialist@sbcusd.com or call (909) 386-2550 if you are missing the necessary link on the Navigation Tree or a button mentioned in the step-by-step instructions.

You may want to run the **District Course Catalog MS or HS** report and have it opened when you start entering course requests so the Course ID's are handy. The query to run this report can be found in the **Query > Load** area of Aeries. To find these reports, enter **catalog** in the **Query Name Filter** field and press [Enter]. Select one of the queries written by Cecil Wright. Click RUN, close Query screen and then click Report.

If you have any questions about the listings, contact Secondary Ed at (909) 473-2077.

To get the listing of your **incoming students**, run the report in Section 5 of this chapter.

Mass Add Course Requests into Aeries

These steps should only be done by the person responsible for building the Scheduling Master Schedule or their assistant.
Mass add the most common courses and then change the exceptions one-by-one. For example, if "most" of your sophomores take 10th grade PE, mass add 10th grade PE to all sophomores and then manually change the few that are going to take Cadet Corp. This significantly reduces the amount of time it takes to enter all course requests.
*There are two ways to Mass Add courses to your students. The first one is called **Course Request Packets** that you will have already created, the second way is to add using **Course ID's** one at a time.*

It is highly advised that you wait until after students have been **pre-enrolled** into your current year's database. This usually occurs in early April.

When typing the Course ID, always use all uppercase characters.

Method # 1: Course Request Packets for a group of Students

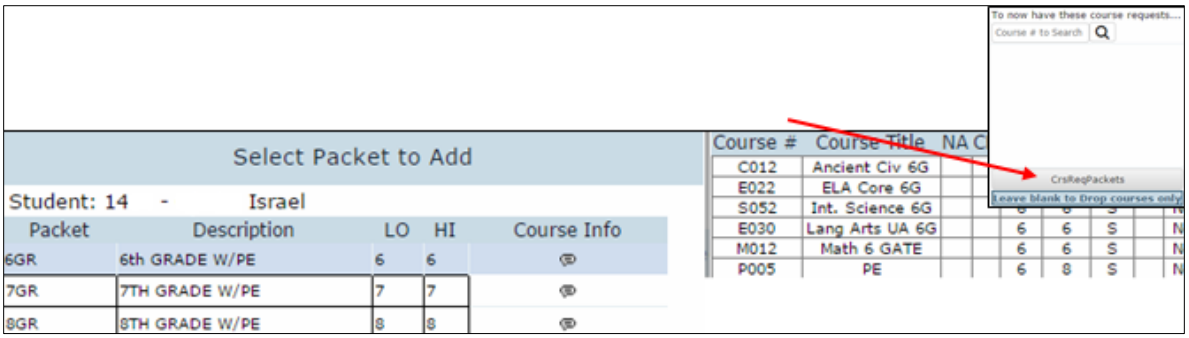
Use this method if you want to add a group of courses to all students in the same grade or group (e.g., your 6th, 7th or 8th grade students or a specific group of students like 6th Gate).

For instructions on how to build Course Request Packets, refer to the **Creating a Course Request Packet** in the appendix of this manual.

When typing the Course ID, always use all uppercase characters.

The **NEXT GRADE** is utilized with Course Request Packets.

1. In the Navigation Tree, click on the **Pages** icon.
2. Type **scheduling dashboard** in the Filter Reports…. field.
3. Click on **Scheduling Dashboard**.
4. Click on **B. Course Requests** and then **Mass Change or Add Course Requests**.
5. Select the **grade** from the **Only change students in the following grades:** area. 6th, 7th or 8th.
6. Click on **CrsReqPackets** under the right side (NOT the LEFT).



7. Select a Packet to Add from the list. This usually correlates with the grade you selected. The Courses associated with this packet will display on the right.
8. Click the **OK** button (bottom of screen).
9. At the **Add Packet XXX?** message, click the **OK** button. All the courses within the packet now appear under Courses on the right side.
10. Click on the [Preview Only] button. Verify the student count that would be updated is correct. If the count is incorrect, go back and fix your choices.
11. Click on **OK**.
12. Click the [Update] button.

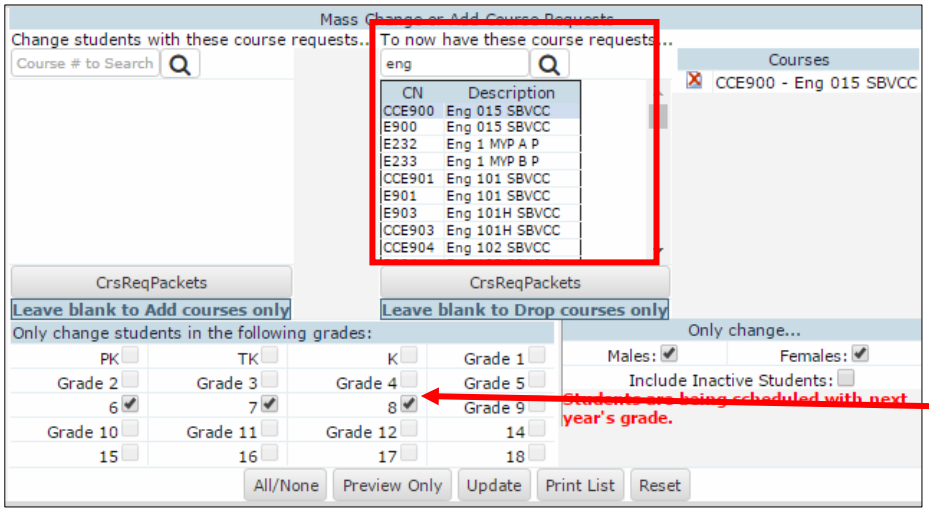
Do not click the **Update** button more than once!!!

When completed, you should receive the same count as in the Preview.

Method # 2: Course Requests – selecting one Course at a time

Use this method if you want to select the courses one at a time for all students in the same grade or group (e.g., your 6th, 7th or 8th grade students or a specific group of students like 6th Gate using a KEEP query).

1. In the Navigation Tree, click on the **Pages** icon.
2. Type **scheduling dashboard** in the Filter Pages…. field.
3. Click on **Scheduling Dashboard**.
4. Click on **B. Course Requests** and then **Mass Change or Add Course Requests**.
5. Leave the left side blank - **Change students with these course requests…**
6. Select the **grade(s)** from the **Only change students in the following grades**.
7. Type the Course # (use capitol letter) or partial name in the right field: **To now have these course requests…**, and then click on the icon.
   a. You can add more courses at this time.
8. Select the correct **Course** from the list.



At least one grade has to be selected. This grade applies to the student's **Next Year Grade** in Aeries.

9. Click on the Preview Only button.
10. Verify the student count is correct. If the count is incorrect, go back and fix your choices.
11. Click on **OK**.
12. Click the Update button. This may take a few minutes.
    When completed, you should receive the same count as in the Preview.

    Do not click the **Update** button more than once!!!

13. Click **OK** on the ### ***students were updated!*** Message.
14. If you want to **Print** the list of students use the Print List button.
15. Click on the Reset button to clear the settings on this screen. This does not reset what you just did.
16. Repeat until you have finished mass adding all the course requests for all the grades/students.

☝ You may want to run the **Scheduling Course Requests Tally** report to make sure the number of courses that were just mass added appears next to the course you added.

Run the **Students With No Course Requests** or **Students with More or Less Than N Course Requests** report to find students who are missing courses or are missing a course request altogether.

Refer to **Section 5 - Course Request Queries & Reports** in this chapter for step-by-step instructions on how to run this report.

☝ To **Mass Delete** or **Mass Change** course requests, follow the **Mass deleting course requests** and/or **Mass changing course requests** instructions on the next page.

Mass Add/Change Course Requests for a Select Group of Students

*You can mass add or change course requests for a select group of students by using the **KEEP** statement in the Query screen. E.g., all your Gate students.*

> ☝ When typing the Course ID, always use all uppercase characters.

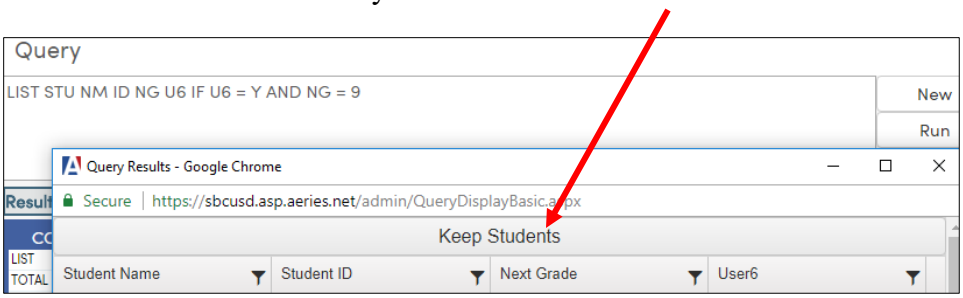
1. Click on the **Pages icon,** and then select **Query** from the Navigation Tree.
2. In the query statement box, enter the query below to identify the students that you want to work with (e.g., all 7th grade GATE students):

   LIST STU NM ID NG U6 IF U6 = Y AND NG = 7 (change grade as needed)

   U6 = GATE and NG = Next Grade.

> ☝ Email reports@sbcusd.com or call 386-2550 and ask for the Aeries Report Team.

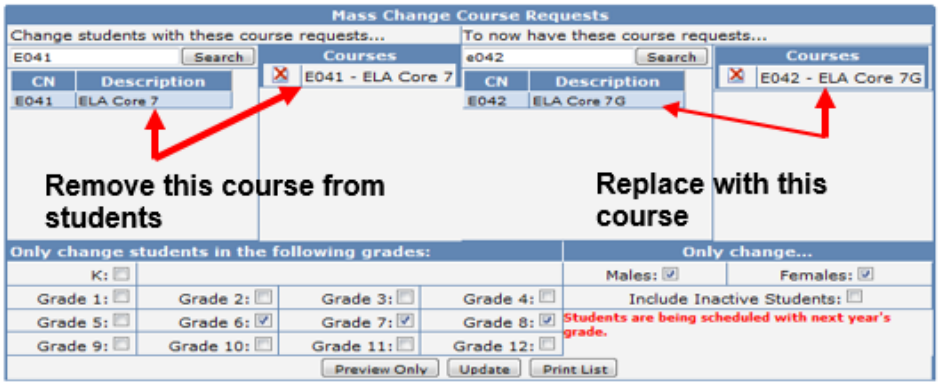
3. Click the **Run** button. A list of students that meet your criteria appears. Review the list to make sure you have the correct students.



4. If this list is correct, click on **KEEP STUDENTS**.
5. Close the Query Results window.

   The **STUDENT RECORDS ARE BEING SKIPPED** message appears in the top left of the Navigation Tree.
6. In the Navigation Tree, click on the **Pages icon**.
7. Type **scheduling dashboard** in the Filter Pages…. field.
8. Click on **Scheduling Dashboard**.
9. Click on **B. Course Requests** and then **Mass Change or Add Course Requests**.
10. If **REMOVING** a Course from these students, enter the course ID you want to remove on the *left side, and then select it.*

11. If **ADDING** a course, then type the course ID that you want to replace (ADD) on the *right side, and then select it*. ONLY USE the right side if adding or replacing a course.



> You can remove or change Course Requests Packets by selecting the CrsReqPackets button, and then follow these same procedures without using individual Course ID's. See Mass Changing Course Requests a few pages down.

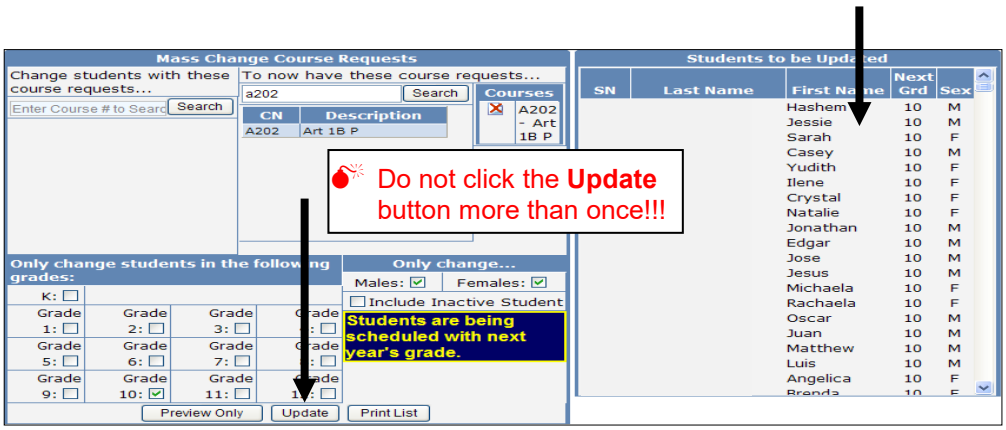
12. Select the correct **Course** from the list.

13. Click on the Preview Only button. If the count is incorrect, go back and fix your choices.

14. Click on **OK**.

15. Click the Update button. This may take a few minutes.
When completed, you should receive the same count as in the Preview.

> Do not click the **Update** button more than once!!!



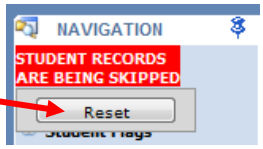
16. Click **OK** on the ### ***students were updated!*** Message.

17. If you want to **Print** the list of students use the Print List button.

18. Click on the Reset button to clear the settings on this screen. This does not reset what you just did.

19. Repeat until you have finished mass adding/changing all the course requests for all the grades/students in this **KEEP** Statement.

20. Click the **Reset** button at the top of the Navigation Tree to remove the **Student Records Are Being Skipped** message when you have finished mass changing courses for this group of students.

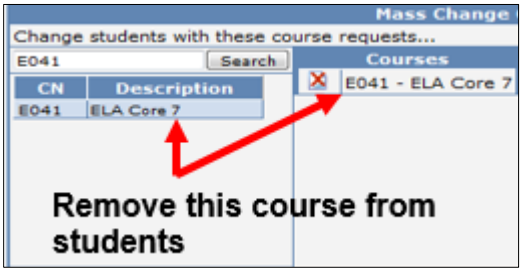


Mass deleting Course Requests (Make sure this is correct.)

Use the steps in this section to mass remove a course(s) from students' Class Scheduling and Course Requests screen.

When typing the Course ID, always use all uppercase characters.

1. In the Navigation Tree, click on the **Pages icon**.
2. Type **scheduling dashboard** in the Filter Pages…. field.
3. Click on **Scheduling Dashboard**.
4. Click on **B. Course Requests** and then **Mass Change or Add Course Requests**.
5. Select the **grade(s)** from the **Only change students in the following grades** (if necessary).
6. Type the Course # (use capitol letter) or partial name in the right field: **To now have these course requests…**, and then click on the icon.
7. *Working in the left side of the window (Change students with these course requests…)*, enter the **Course #** you want to delete in the field and then click the **Search** button.



You can only mass delete 1 course at a time.

8. Select the course when it pops up in the results area (directly below the search field). This will display the course to the right of the Search button.
9. Click on the Preview Only button. Verify the student count and names are correct.
10. Click on **OK**. If the count is incorrect, go back and fix your choices.
11. Click the Update button. This may take a few minutes.
    When completed, you should receive the same count as in the Preview.

    Do not click the **Update** button more than once!!!

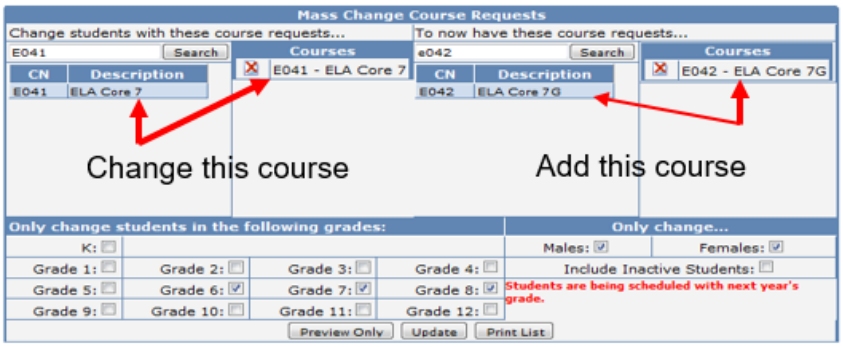
12. Click **OK** on the ***### students were updated!*** Message.
13. If you want to **Print** the list of students use the Print List button.
14. Click on the Reset button to clear the settings on this screen. This does not reset what you just did.

Mass changing Course Requests

Use the steps in this section to mass change one course(s) from students' course request record to a different course(s).

1. In the Navigation Tree, click on the **Pages icon**.
2. Type **scheduling dashboard** in the Filter Pages…. field.
3. Click on **Scheduling Dashboard**.
4. Click on **B. Course Requests** and then **Mass Change or Add Course Requests**.
5. Select the **grade(s)** from the **Only change students in the following grades** (if necessary).
6. *Working in the left side of the window below* (Change students with these course requests…), enter the **Course #** (use capitol letter) or partial name of course you want to CHANGE into the field and then click the **Search** button.

7. **Select** the desired course under the search field to populate the **Courses** list.
8. Under the **To now have these course requests…**, enter the **Course #** or partial name of course you want to **ADD** to the students into the Search field.
9. Click the **Search** button. Select the course in the results area (directly below the search field). This will display the course to the right of the Search button.



10. Click on the Preview Only button. Verify the student count is correct.
11. Click on **OK**. If the count is incorrect, go back and fix your choices.
12. Click the Update button. This may take a few minutes.
    When completed, you should receive the same count as in the Preview.

    Do not click the **Update** button more than once!!!

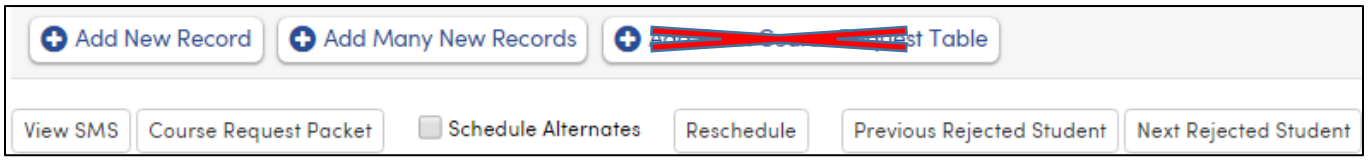
13. Click **OK** on the ### ***students were updated!*** Message.
14. To **Print** the list of students use the Print List button.
15. Click on the Reset button to clear the settings on this screen. This does not reset what you just did.

Manually add Course Requests to Individual Students

Use these steps to enter course requests manually if you choose not to mass add or are finished mass adding courses and will edit individual students.

There are three ways in which to manually add course requests:

- **Course Request Packet**
- **Add New Record**
- **Add Many New Records**



> Please run the **Course Request Tally Report** before you get started to see how many students have already requested certain Courses.

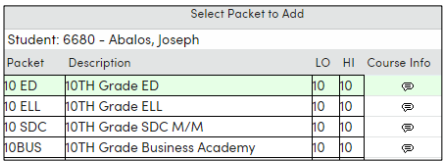
Course Request Packet for an Individual Student

Use this method if you want to add a group of courses to one student's course request/class scheduling screen.

> For instructions on how to build Course Request Packets, refer to the **Creating a Course Request Packet** in the appendix of this manual.

1. From the Navigation Tree, click on the **Pages icon**.
2. Type **scheduling dashboard** in the Filter Pages…. field.
3. Click on **Scheduling Dashboard**.
4. Click on **B. Course Requests** and then **Student Course Requests**.
5. Make sure you are on the correct student.
6. Click the Course Request Packet button (bottom left of screen).
7. Select the course packet name from the list.

   The Courses associated with this packet will display on the right.



8. Click the OK button (bottom of screen).
9. Click **OK** again.

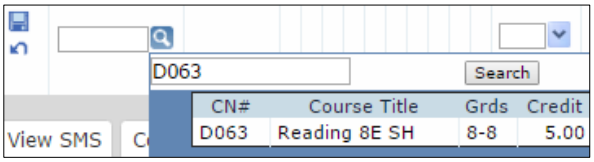
   All the courses within the packet now appear in the student's Course Requests screen.

Add a New Course Record or many new records to an Individual Student

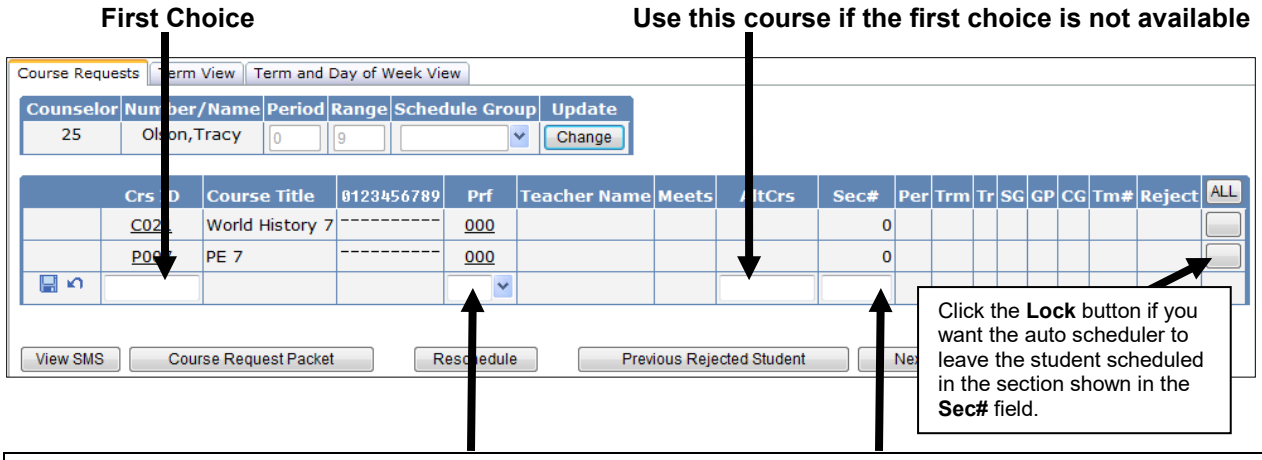
Use this method if you want to add "one" course at a time to a student's Course Requests / Schedule screen.

> ☝ When typing the Course ID, always use all uppercase characters.

1. From the Navigation Tree, click on the **Pages icon**.
2. Type **scheduling dashboard** in the Filter Pages…. field.
3. Click on **Scheduling Dashboard**.
4. Click on **B. Course Requests** and then **Student Course Requests**.
5. Make sure you are on the correct student.
6. Click the Add New Record or Add Many New Records button.
7. In the **CrsID** field, enter the desired Course ID.
   OR
   Enter a partial name of the course and click **Search**. Courses that match your criteria display directly below the Search field.



8. Select the course in the results area.
9. In the **AltCrs** field, enter an alternate Course ID in case the first choice is not available.



> ☝ If you have a teacher preference or you want to request a specific section, note it in the **Prf** and/or **Sec#** fields and the auto scheduler will use these fields to schedule the student instead of the Crs ID field. Entering a specific section number in this screen and clicking the **Lock** button will automatically schedule the student in that section.

> ☝ To **Cancel** what you started adding, click the **Undo** button to reverse what you added *before* you save.

10. Repeat steps until all courses are added
11. Click the **Save** button to save what you added.

> To **delete a course**, click on the **Change** button and then click the **Delete** button. At the **Are you sure…** message, click **OK**.

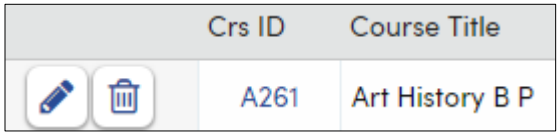
> You may want to run the **District Course Catalog MS or HS** report and have it opened when you start entering course requests so the Course ID's are handy. The query to run this report can be found in the **Query > Load** area of Aeries. To find these reports, enter **catalog** in the **Query Name Filter** field and press [Enter]. Select one of the queries written by Cecil Wright.

> Run the **Students with More or Less Than N Course Requests** or **Students With No Course Requests** report to find students who are missing courses or are missing a course request altogether. Refer to **Section 5 - Course Request Queries & Reports** in this chapter for step-by-step instructions on how to run these reports.

Change a Course Request for an Individual Student

Use these steps to make course request changes to an individual student's Course Requests/Schedule screen.
Changes can be made in this screen up to the last auto scheduling run.
Once the new schedule is locked down and made into next year's Scheduling Master Schedule, do not make any more changes to this screen.

1. From the Navigation Tree, click on the **Pages icon**.
2. Type **scheduling dashboard** in the Filter Pages…. field.
3. Click on **Scheduling Dashboard**.
4. Click on **B. Course Requests** and then **Student Course Requests**.
5. Make sure you are on the correct student.
6. Click on the **Edit Record** button (pencil) next to the course you want to change.



7. To **Change** a course ID, drag over the current Course ID and type in the new Course ID.
8. Click the **Save** button to save the change.
   OR
   Click on the **Delete** button to delete the record.
   OR
   Click the **Undo** button to cancel the editing process and not make any changes.

Section 5 - Course Requests Queries and Reports

A list of useful queries and reports to help you find potential problems are listed here with a sample of what the report looks like.

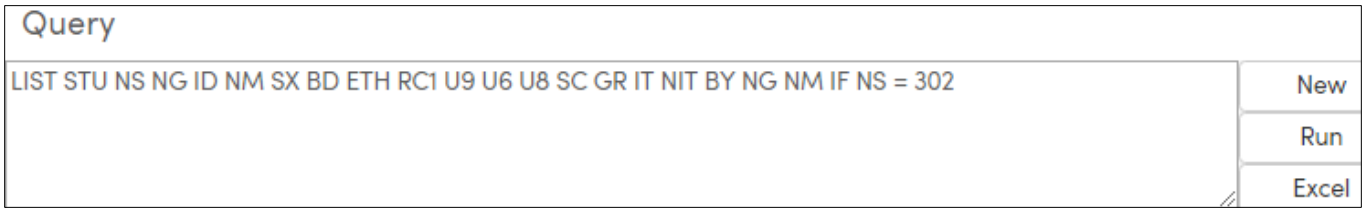
- Query to list incoming students
- Student's with duplicate Course Requests
- Students With More or Less Than N Course Requests Report
- Students Course Requests Query by Grade and Course
- Students With No Course Requests Report
- Scheduling Reverse Verification Listing
- Scheduling Course Request Listing
- Scheduling Course Request Tally
- Scheduling Course Request Letter to Parent

Query to list incoming students

*The query below will list all your incoming students. It must be run at the **DISTRICT level** to get all incoming students. Depending on the time of year, you may see duplicates due to the "Pre-Enrolled" students.*

1. Make sure you are in the San Bernardino City Unified School Dist. .
2. Navigate to the **Query** screen.
3. In the query below, change the site 3-digit code to your site, and then copy and paste the query into the query command field in Aeries.

   LIST STU NS NG ID NM SX BD ETH RC1 U9 U6 U8 SC GR IT NIT BY NG NM
   IF NS = **302**



4. Click the **Excel** button (right side of screen).

Students with duplicate Course Requests

This report will show you students with duplicate Course Requests.

1. Make sure you are in your school site.
2. Click on the **Reports icon** and type **duplicate** in the Filter Reports field.
3. Select the **Students With Duplicate Course Requests** report.
4. Select the options you want.
5. Run Report.

Delete Duplicate Courses given to Students

Use this method to delete the duplicate course(s) given to any of your students (MASS Delete).

1. Make sure you are in your school site.
2. From the Navigation Tree, click on the **Pages icon**.
3. Type **scheduling dashboard** in the Filter Pages…. field.
4. Click on **Scheduling Dashboard**.
5. Click on **B. Course Requests** and then **Delete Duplicate SSS Records**.
6. Click the Delete Duplicate SSS (Course Request) Records button.

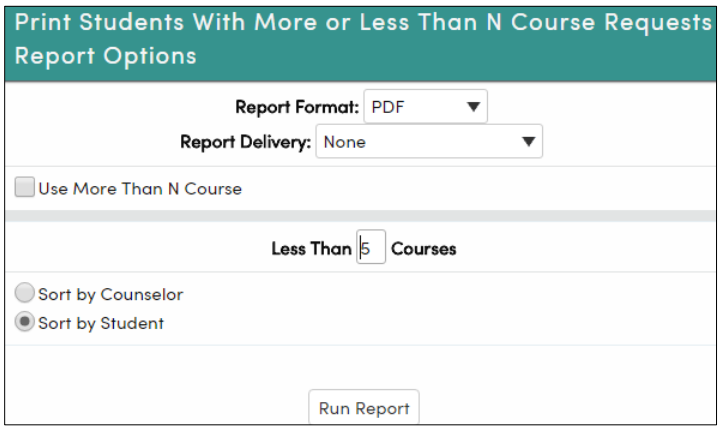
This Mass Deletes any duplicate course(s) a student had. It leaves only one of the duplicates. There is no UNDO so be very sure you want to do this.

Students With More or Less Than N Course Requests

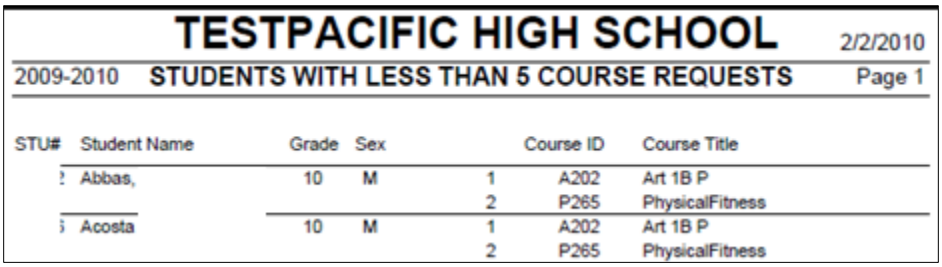
This report will identify students who do not have a complete set of Course Requests

Use this report to find students who have requested too many or too few courses. If the student does not have enough Course Requests, the auto scheduler will not be able to schedule the student into all their required courses.

1. Make sure you are in your school site.
2. From the Navigation Tree, click on the **Pages icon**.
3. Type **scheduling dashboard** in the Filter Pages…. field.
4. Click on **Scheduling Dashboard**.
5. Click on **B. Course Requests** and then **Students with More or Less Than N Course Requests**.
6. Select the desired **Report Format** and **Report Delivery** options.
7. To look for students with **too many Course Requests**, check the **Use More Than N Course** option and enter a value in the **More Than Courses** field one digit *higher* than what you are looking for (i.e., enter 7 if you are looking for students with 6 or more courses).
   -OR-
   To look for students who are **missing courses**, enter a value one digit *lower* than what you are looking for in the **Less Than Courses** field (i.e., enter 5 if you are looking for students with 6 or fewer courses).
8. Click the **Run Report** button.
9. Click on the **View Report** button.



10. To print the report, click the **Print** button and then click **OK**.
11. Close the Adobe Reader or Excel window and then the View Report window.



TESTPACIFIC HIGH SCHOOL 2/2/2010

2009-2010 STUDENTS WITH LESS THAN 5 COURSE REQUESTS Page 1

STU#	Student Name	Grade	Sex		Course ID	Course Title
	Abbas,	10	M	1	A202	Art 1B P
				2	P265	PhysicalFitness
	Acosta	10	M	1	A202	Art 1B P
				2	P265	PhysicalFitness

Students Course Requests Query by Grade and Course

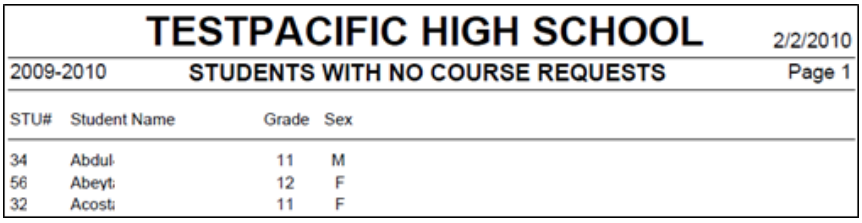
Copy and paste this query into the Aeries query screen to see all students with the specified course and grade.

1. KEEP STU SSS IF STU.GR = 8 AND SSS.CM = XXXX (change grade and course ID as needed).
2. Click the RUN button. Check the students and count to see if correct.
3. Close that window.
4. Click the Excel button.

Students with no Course Requests

Use this report to identify students who do not have Course Requests entered into Aeries.

1. Make sure you are in your school site.
2. From the Navigation Tree, click on the **Pages icon**.
3. Type **scheduling dashboard** in the Filter Pages…. field.
4. Click on **Scheduling Dashboard**.
5. Click on **B. Course Requests** and then **Students With No Course Requests**.
6. Select the desired **Report Format** and **Report Delivery** options.
7. Select the desired **Sort By** option.
8. Click the **Run Report** button.
9. At the **File download** dialog box, click on the View Report button. The **Students With No Course Requests** report displays.
10. To print the report from within Adobe Acrobat Reader, click the **Print** button and then click **OK**.
11. Close the Adobe Reader or Excel window and then the View Report window.



TESTPACIFIC HIGH SCHOOL 2/2/2010

2009-2010 STUDENTS WITH NO COURSE REQUESTS Page 1

STU#	Student Name	Grade	Sex
34	Abdul	11	M
56	Abeyt	12	F
32	Acost	11	F

> This is a query you can run to get a listing of students without Course Requests.
> This will skip students with Course Requests. You can scroll from student to student to input into their Course Request screen:
> **SKIP STU SSS SMS CRS IF CRS.CN # " "**

Scheduling Reverse Verification Listing

This report lists the names of the students and the Course Requests they have. This is a good report that will help you identify bad data so you can correct it before creating sections. It will also give you the names of the students that have signed up for the wrong course (e.g., 9th grade student who signed up for a 10th grade class). You can also give this report to a student's current teacher to determine if they are ready to move up to the next level (e.g., Honors/AP teachers or Foreign Language teacher).

1. Make sure you are in your school site.
2. From the Navigation Tree, click on the **Pages icon**.
3. Type **scheduling dashboard** in the Filter Pages…. field.
4. Click on **Scheduling Dashboard**.
5. Click on **B. Course Requests** and then **Scheduling Reverse Verification Listing**.
6. Select the desired **Report Format** and **Report Delivery** options.

   All students and Courses are selected by default

7. Click **Run Report**.
8. Click on the **View Report** button.
9. To print the report from within Adobe Acrobat Reader, click the **Print** button and then click **OK**.
10. Close the Adobe Reader or Excel window and then the View Report window

2010-2011 **Reverse Verification Listing** Page 464

P202 PE Survey 1B

STU#	Last Name	First Name	Grade	Sex	STU#	Last Name	First Name	Grade	Sex
58		Christian	9	M	58		Vincent	9	M
59		Syvannah	9	F	58		Michael	9	M
58		Augie	9	M	58		Gemma	9	F
59		Arthurson	9	M	58		Gerardo	9	M
57		Cynthia	10	F	59		John	9	M
58		Joshua	9	M	59		Zacary	9	M

This 10th grade student should not be requesting a 9th grade PE class.

Scheduling Course Request Listing

This report will show you what courses you have assigned to the students.

1. Make sure you are in your school site.
2. From the Navigation Tree, click on the **Pages icon**.
3. Type **scheduling dashboard** in the Filter Pages…. field.
4. Click on **Scheduling Dashboard**.
5. Click on **B. Course Requests** and then **Scheduling Course Request Listing**.
6. Click **Run Report**.
7. Print or save then close the window.

Query to run this report by Grade:

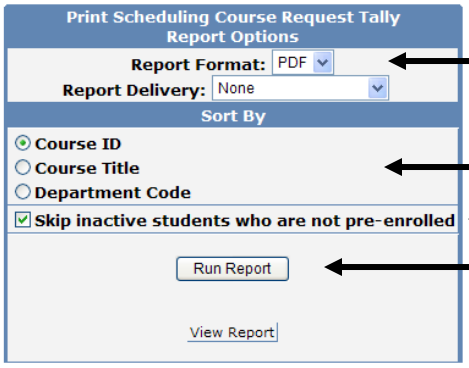
```
LIST STU SSS CRS STU.FN STU.LN STU.GR STU.SX STU.ID CRS.CN CRS.CO IF STU.GR = 9
```

Scheduling Course Request Tally

This report will tell you how many students (by grade) have signed up for specific courses (not who). This information will help you decide how many sections to create for the current demand. It is also helpful for spotting students that have requested a course outside of their grade level.

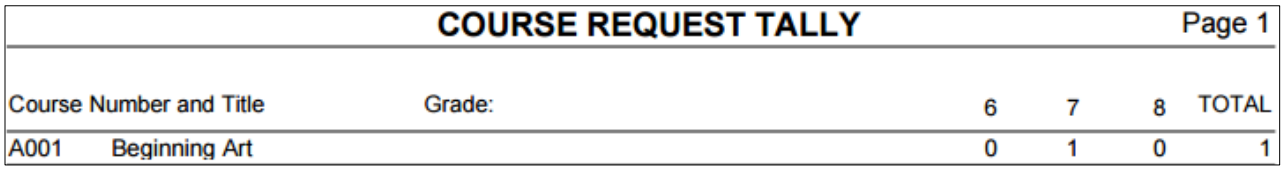
This report will also show you if you have used similar course IDs by mistake (e.g., C0011 vs. C011).

1. Make sure you are in your school site.
2. From the Navigation Tree, click on the **Pages icon**.
3. Type **scheduling dashboard** in the Filter Pages…. field.
4. Click on **Scheduling Dashboard**.
5. Click on **B. Course Requests** and then > **Scheduling Course Request Tally**.
6. Select the desired **Report Format** (e.g., PDF or XLS) and **Report Delivery** (e.g., None or Email with attachment) options.
7. Select the desired sort by options (e.g., Course ID or Course Title).
8. Verify that the **Skip inactive students who are not pre-enrolled** option is checked.



If the **Skip inactive students** option is checked, the report will include active and pre-enroll students. It does not include other inactive students (e.g., Leave, No Show, Wrong School, Expelled, etc.)

9. Click the **Run Report** button.
10. Click on the **View Report** button.



COURSE REQUEST TALLY Page 1

Course Number and Title	Grade:	6	7	8	TOTAL
A001 Beginning Art		0	1	0	1

11. To print the report, click the **Print** button and then click **OK**.
12. Close the Adobe Reader window.

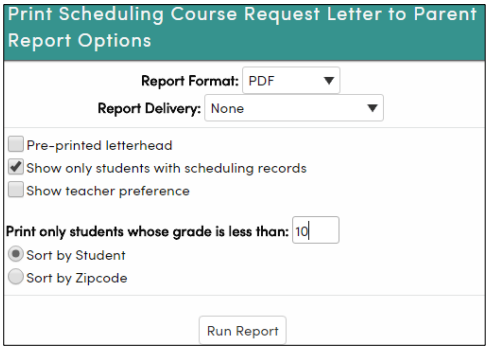
Scheduling Course Request Letter to Parent

Use this report to print a letter to the parent/guardian listing the student's Course Requests so the student and parent can review it and contact the student's counselor if they want to change something.

> To edit the text within the letter, click on #10. Course Request Letter Text Editor.

> If activated, this information is also visible in the **ABI Student and Parent Portal** under the **Student Info > Courses** screen.

1. Make sure you are in your school site.
2. From the Navigation Tree, click on the **Pages icon**.
3. Type **scheduling dashboard** in the Filter Pages…. field.
4. Click on **Scheduling Dashboard**.
5. Click on **B. Course Requests** and then **Scheduling Course Request Letter to Parent**.
6. Select the desired **Report Format** (e.g., PDF or XLS) and **Report Delivery** (e.g., None or Email with attachment) options.
7. Select other options (e.g., show only students with scheduling records).
8. Select desired sort options (e.g., by Student).
9. Click the **Run Report** button.
10. Click **View Report**.



Michael
Re: Precious
E 3rd St
San Bernardino CA 92410

Dear Parent:

This letter is to inform you of Precious course requests for the coming year. Please review it with Precious to make sure it is acceptable to both of you.

CrsID	Course Title
U302	ChoirCncrt 1B P
M233	Int. Math 1A
E221	English 1C B P
O119	Leaders of the PACC A
C335	W Geog C B P
S261	Biology 1C A P
E220	English 1C A P
P202	PE Survey 1B
U301	ChoirCncrt 1A P
P201	PE Survey 1A
O120	Leaders of the PACC B
M234	Int Math 1B
S262	Biology 1C B P
C334	W Geog C A P

We are looking forward to an excellent school year. Working together, we will create a rewarding

11. To print the report, click the **Print** button and then click **OK**.
    Be patient. This may take up to a minute to complete due to the volume of letters it is generating.

Chapter 3 - Create Sections

Topics covered in this chapter:

Section 1:

--Add new sections to Scheduling Master

--Mass add new sections to Scheduling Master

--Using the SMS Board

--Edit SMS Board display settings

--Move/Copy/Delete sections

Section 2:

--Creating Sections Queries and Reports

Section 1 – Adding Sections to the Scheduling Master

Use the figures on the Course Request Tally report to calculate how many sections for each course you will need to create to meet your course request demand.

There are three screens in Aeries that will allow you to create and enter sections into **Aeries**.
1) **Scheduling Master** screen
2) **SMS Board** screen
3) **SMS Builder** screen

We recommend that you **create** the sections using the Scheduling Master screen or the SMS Builder feature. Then we recommend that you **fine-tune** your schedule using the SMS Board screen. All methods are detailed in this section.

> ☝ It would be more efficient to create your single sections (only 1 period for ASB) first, your double sections (2 periods for AP US Hist) next, then your triple sections and so on until all sections are entered.

> ☝ To MASS ADD sections, like Teacher Aides or PE, see SMS Builder MASS ADD after this option.

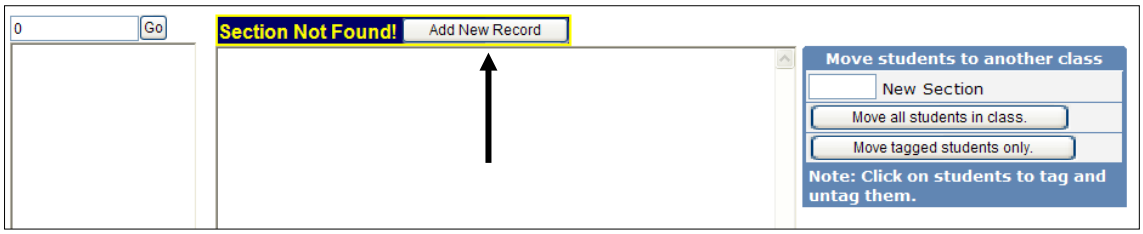
> ✽ *Steps beginning with an * are not used by our district or are auto populated by Information Technology.*

Scheduling Master Screen

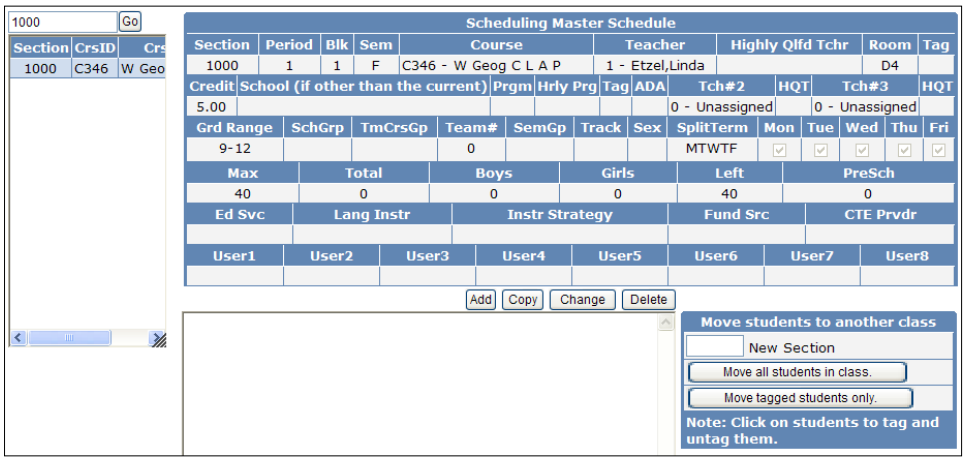
1. Click on the **Pages** icon, and then type **scheduling dashboard** into the Filter Pages field.
2. Select **Scheduling Dashboard > C. Build Scheduling Master Schedule > Scheduling Master Schedule** link.

> If you see the **Scheduling tables are inactive** message, then **Section 3 –Initialize SSS and SMS tables to begin the scheduling Master Schedule process** in this chapter 2 was not completed. Call Information Technology to set this up for you – 386-2550.

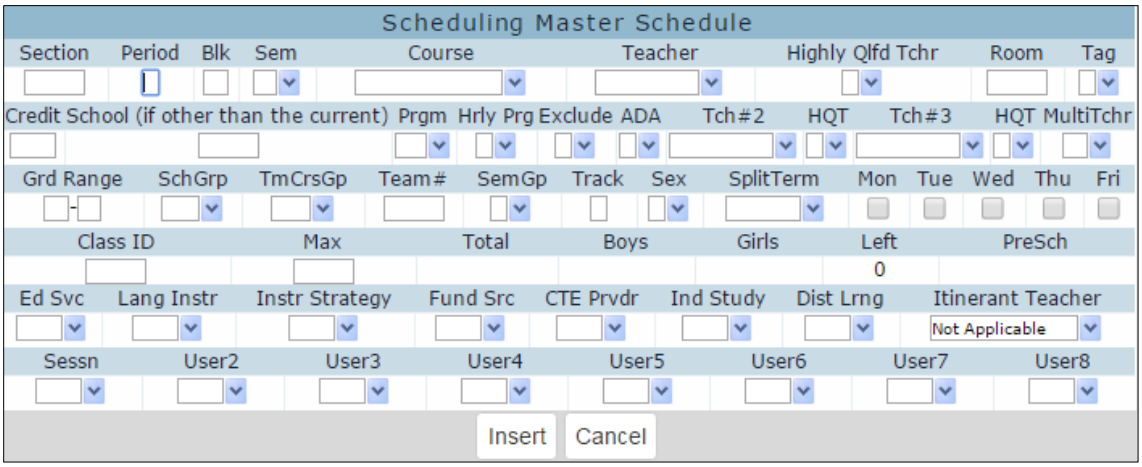
This is how the screen looks when there are no sections created.



This is how the screen looks when there are sections already created.



3. Click on the Add New Record button (top of screen) or Add button (middle of screen). A blank new section form appears. The Add New Record button will only appear when there are no sections created.



4. Aeries will automatically assign a **Section** number.
5. In the **Period** field, enter the desired period and press **[Tab]**.

> ☝ By default, Aeries will use the 1000-1999 sequence for period 1 sections, 2000-2999 sequence for period 2 sections, etc. You can modify the section number manually **after** an automatic number appears by simply dragging over the number Aeries assigned and entering a different number. **The section number must be changed before you save the new record!**

6. The **Blk** (block) field, enter a **1**. Contact Information Technology if your site uses 2-block sections before continuing. E.g., 2-blocks are used when a student will have 2 periods for the same English class or a Science class with a Lab.
7. In the **Sem** field, enter the semester in which this section will be offered.
8. In the **Course** field, select the course from the drop-down list. You can also enter the 4-digit course ID. Make sure to use **Capitol** letters for the course letter.
9. In the **Teacher** field, select the teacher from the drop-down list. If you know the teacher's ID, you can enter their ID in this field.

SUB teachers can be changed to a teacher name until the day before school starts. On or after the first school day, please call Attendance Accounting for instructions.

Per I.T., the new teacher list will be updated after they run promotions.

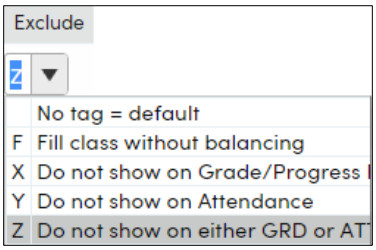
10. *The **Highly Qlfd Tchr** (Highly Qualified Teacher) field is not used by our district.

If this section is going to be taught by two teachers (**Job Share/Alternating**), then complete Step 18 (Tch #2) and Step 20 (Multi Tchr).

Prgm field

100	5% Projects
101	504 Accommodation Plan
102	Adolescent Family Life Program
103	Adult Basic Education (Abe)
104	Adult Education
105	Adults w/Disabilities
106	Alternative Education: Continuation
107	Alternative Education: Community/Experience Base
108	Alternative Education: Opportunity
	Alternative Education: Magnet

11. In the **Room** field, enter the room number (e.g., E9). You can enter up to 4 characters.
12. In the **Tag** field (1st line) leave blank for active sections. Select **Inactive** if you want to disable this section.
13. In the **Credit** field, verify that the number **5** appears in the field.
14. The **School (if other than the current)** field is not used by our district.
15. In the **Prgm (Program)** field, select the educational program from the drop-down list (e.g., Dual).
16. *The **Hrly Prg** (Hourly Program) field is not used by our district.



17. In the **Exclude** field, select one of the following if it applies:
    No tag = Default
    Fill class without balancing – select this option if you **do not** want a male/female balance of students.
    Do not show on grade/progress report - if the teacher will not be issuing a grade for this section.
    Do not show on attendance – If teacher will not be taking attendance for this section.
    Do not show on either GRD or ATT – if the teacher will not be taking attendance or issuing grades for this section.
18. In the **ADA** (Average Daily Attendance) field, select one of the following:
    Counted in Mass Change – if our district collects ADA for the students in this section.
    OR
    Not Counted in Mass Change - if our district does not collect ADA for the students in this section.
19. In the **Tch #2** and **Tch#3** fields, select a teacher if this section is shared by other teachers (job share).
20. *The **HQT** (Highly Qualified Teacher) fields (second row) are not used by our district.
21. In the **MultiTchr** field, select **01 Team Teaching (at same time) or 02 Job Share (Alternating)** if two teachers are going to be job sharing. The selection is your admins choice. These teachers must be in the Teacher Table in order to take attendance. If they do not see their sections, contact Information Technology's: securityspeicalist@sbcusd.com.

If this field is missing in the Scheduling Master screen, then wait until Information Technology creates next year's database and select 02 Job Sharing (Alternating) from the Scheduling Master Schedule screen. Make sure you select this option **before the start of the new school year!**

22. In the **Grade/Range** field, enter a grade range if you want to restrict who can take this course based on their grade (i.e., to prevent 9th graders from taking a class, enter 10-12 into the range).

23. If necessary, enter values in the **SchGrp** (Schedule Group), **TmCrsGp** (Team Course Group), and/or **Team#** to further restrict students who can register for this section.

> ☝ For assistance with creating groups (courses and/or student groups), watch the training videos: http://www.aeries.com/training-support/support-videos **SUPPORT VIDEOS** to **Scheduling**. Refer to the **How to use SchdGrp, TmCrsGp, and Team# fields to schedule students** in the **Appendix** for additional ways in which to control how the auto scheduler places students into sections.

24. *The **SemGp, Track** fields are not used by our district.
25. In the **Sex** field, select an **F** (female) or **M** (male) from the drop-down list if you want to restrict who can take this course based on their gender.
26. In the **SplitTerm** field, select when this section meets from the drop-down list (e.g., Usually MTWTF).

    The **Mon**, **Tue**, **Wed**, **Thu**, **Fri** fields will automatically populate based on what you select in the **Split Term** field.

Split Term

MTWTF	Meets daily Monday-Friday
M-W-F	Meets Mon, Wed, Friday only
-T-T-	Meets Tuesday,Thursday only
MT-T-	Meets Mon, Tue, Thursday only
--W-F	Meets Wed, Friday only
M-W--	Meets Mon, Wed only
FIRST	Meets First Half Term
SECOND	Meets Second Half Term
A-DAYS	Meets on A Days
B-DAYS	Meets on B Days
DAILY	Meets every day

27. *The **Class ID** field is not used by our district.
28. In the **Max** field, enter the **maximum seats available** for this section.
29. The **Total**, **Boys**, **Girls**, and **Left** field will automatically populate.
30. *The **PreSchl, Ed Svc, Lang Instr, Instr Strat, Fund Src, CTE Prv, Ind Study, Dist Lrng and Itinerant Teacher** fields – DO NOT POPULATE.
31. The **Sessn** field can be used for AM, PM or Full Day sections but is not necessary.
32. *The **User2**, **User3**, **User4**, **User5**, **User6**, **User7**, **User8** fields are not used by our district.
33. Click the Insert OR Save button to save your changes. The new section now appears in the list to the left of this screen. If you **do not** want to save this section, click the Cancel button.
34. Repeat the steps above until all sections are added.
    OR
    Use the **Copy** button to copy the section you just created and then edit the new section as needed. Click the **Insert** button to save the newly copied section after all edits are completed.

> ☝ You can mass add sections by using the SMS Builder feature. Refer to the instructions that begin on the next page for how to mass add sections.

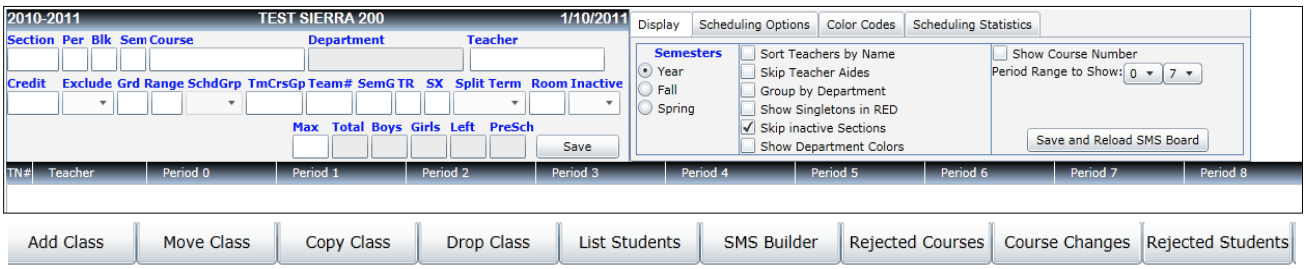
35. When you have finished entering all your sections, run the **Scheduling Master Schedule** and **Scheduling Master Schedule Error** reports to check for errors and accuracy. These reports can be found in Section 2 of this chapter– Creating Sections Queries and Reports.

SMS Builder Screen – Mass Add Sections

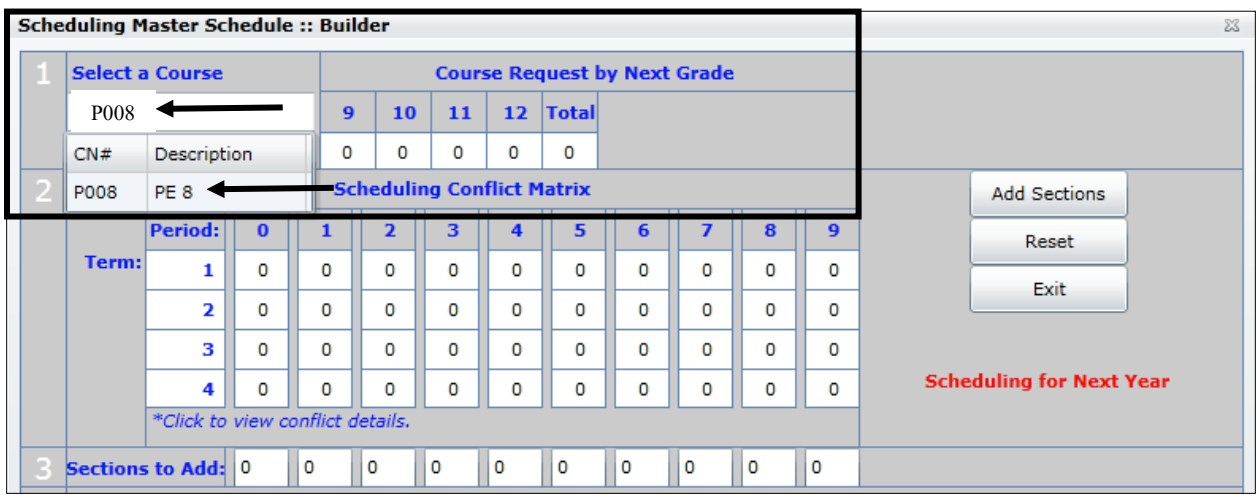
Use the SMS Builder feature to mass add sections of the same course ID. This method is good for adding your most common courses (e.g., PE, Core ELA, Core Math, etc.). For Teacher Aide mass adding, see Mass Add Teacher Aides below.

1. Click on the **Pages** icon, and then type **scheduling dashboard** into the Filter Pages field.
2. Select **Scheduling Dashboard > C. Build Scheduling Master Schedule > SMS Board** link.

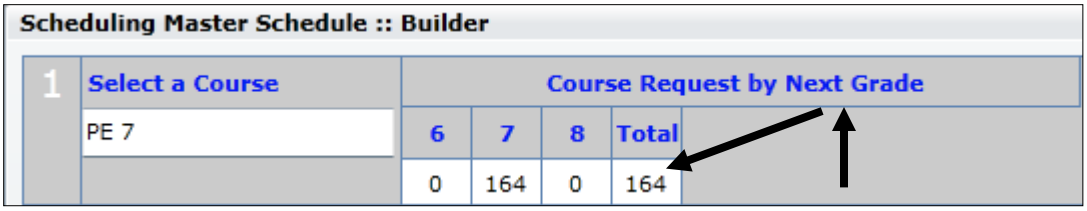
The Scheduling Master Board screen appears



3. Click on the SMS Builder button (bottom of screen).
4. In the **# 1 area**, **Select a Course**, enter the **Course ID** (use capitol letter) that you want to mass add (e.g., P008). After typing the course ID, the ID and description appears. Click to select the course ID shown or press the **[Tab]** key to complete the task.



Study the value in the grade level area to make sure the number of course requests matches the number of students who you believe will be in that courses' grade next year. In this example, there are 164 students who have requested course PE 7 that will be in 7th grade **next year**.

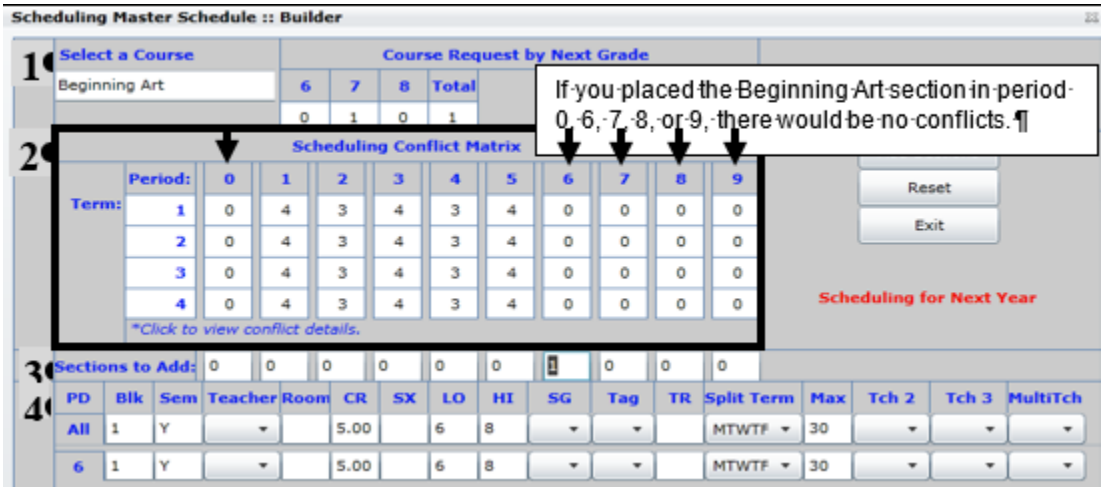


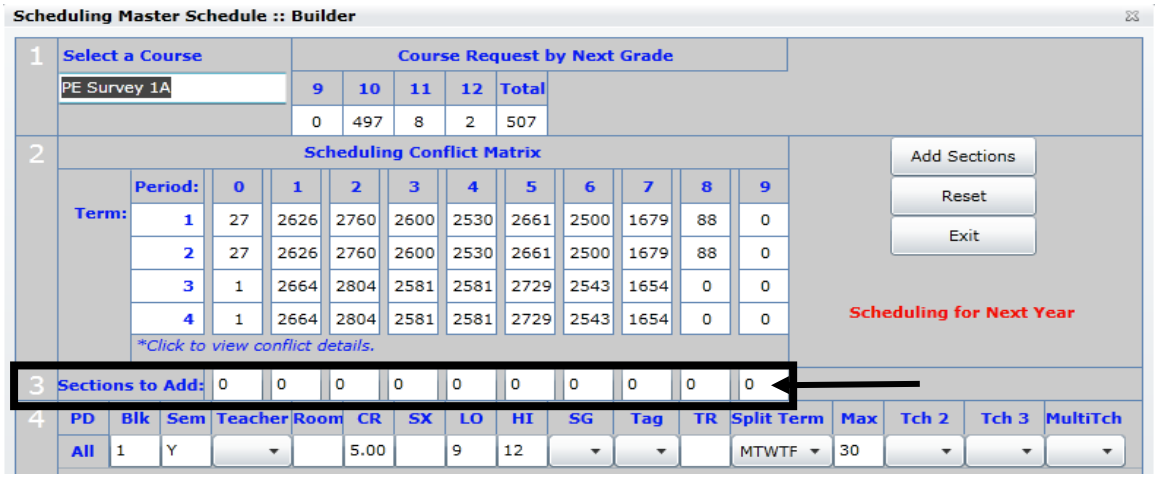
5. Study the **# 2 area, Scheduling Conflict Matrix,** to guide you in placing the section in a period that has the fewest conflicts. For example, if you wanted to add a Beginning Art section in period 0, 6, 7, 8, or 9, there would be no conflicts if you ran the auto scheduler now.

   Periods 1, 2, 3, 4, and 5 show values and this would be the number of students that would not be able to attend if Beginning Art were placed in one of these periods.

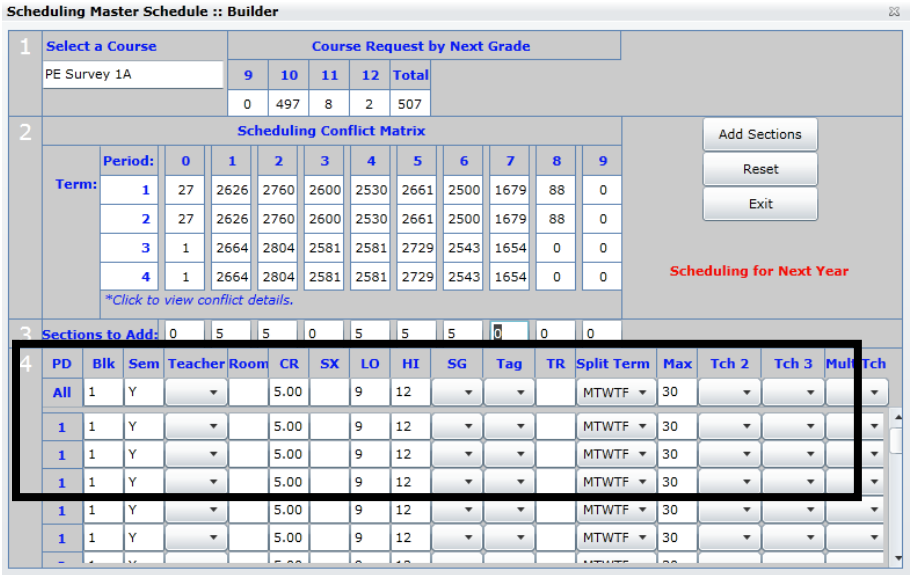
   > ☝ It is unlikely that you will be able to find a period that does not have any conflicts. Strive to place a section in a period with the lowest numbers.

6. In the **# 3 area, Sections to Add**, click in the desired period and enter how many sections you want to mass add into that period. The added section(s) appear in area 4.





7. In the **# 4 area**, select additional information for each section added. For example, if you know what teacher will teach the first period PE Survey class, click the drop-down arrow in the **Teacher** column



and select the teacher. You can also select the SG (Scheduling Group), Tag, and Split Term details.

8. The **ALL row** (1st line in #4) is used to make all the sections the same based on what you put in the fields. E.g., if one teacher will teach all the PE sections you are adding, put that teacher name in the Teacher field.
9. Click the Add Sections button to mass add the sections marked in the **# 4** area.
10. This may take a minute or so. Click on **OK** for the message ## sections added to SMS.

> ☝ To make changes to any of these, go to **Scheduling Process > Scheduling Dashboard > C. Build Scheduling Master Schedule > SMS Board** link. See next option.

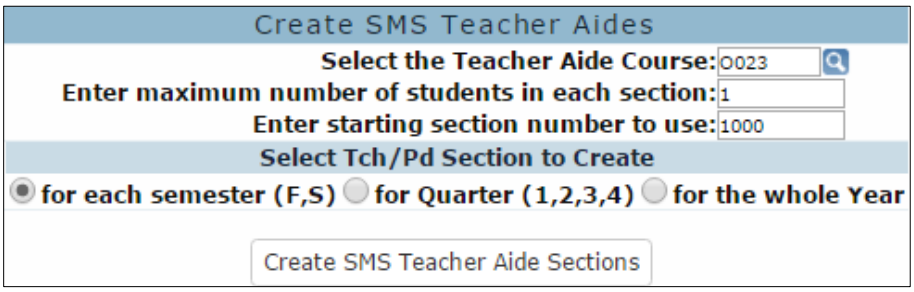
11. Click the Exit button to return to the SMS Board screen.

Mass Add Teacher Aide Sections

After adding all your sections, use this method to create Teacher Aide sections for all your sections.

1. Click on the **Pages** icon, and then type **scheduling dashboard** into the Filter Pages field.
2. Select **Scheduling Dashboard > C. Build Scheduling Master Schedule >Create SMS Teacher Aide Sections** link.

   The Create SMS Teacher Aides screen appears.



3. Enter the **Course**.
4. **Max** number of students in each **section** is normally 1.
5. **Enter starting section number to use**: **1000**. **This creates for all periods that have this Course.**
6. Select the **Term** that applies.
7. Select the Create SMS Teacher Aide Sections button.

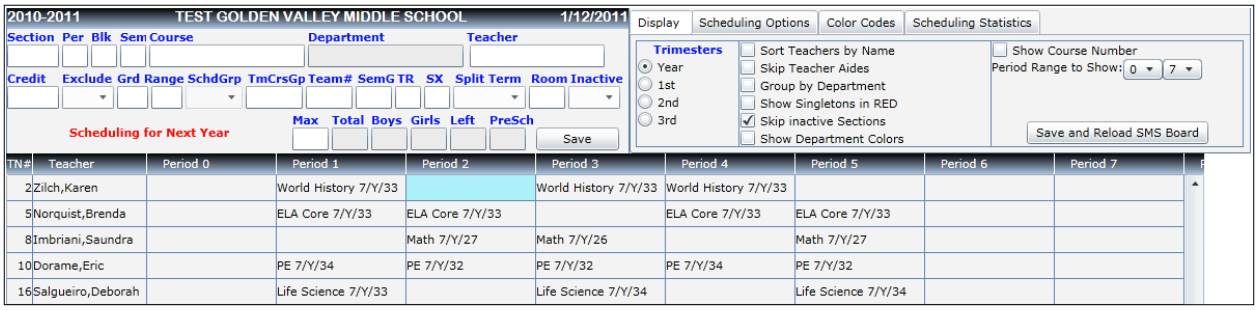
   Review using the **SMS Board.**

SMS Schedule Board (Scheduling Master)

After adding all the sections your site will be offering next semester, you may want to make final adjustments using Aeries' Scheduling Master Schedule Board.

1. Click on the **Pages** icon, and then type **scheduling dashboard** into the Filter Pages field.
2. Select **Scheduling Dashboard > C. Build Scheduling Master Schedule > SMS Board** link

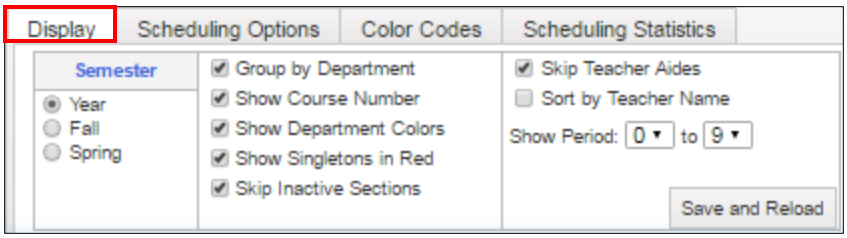
   All sections added via the SMS Builder screen and the Scheduling Master screen will appear on the SMS board.



> If a section is not appearing on the SMS Board screen, it means the Sem field is blank or in the Display settings tab you have the incorrect Semester selected (see pic below).

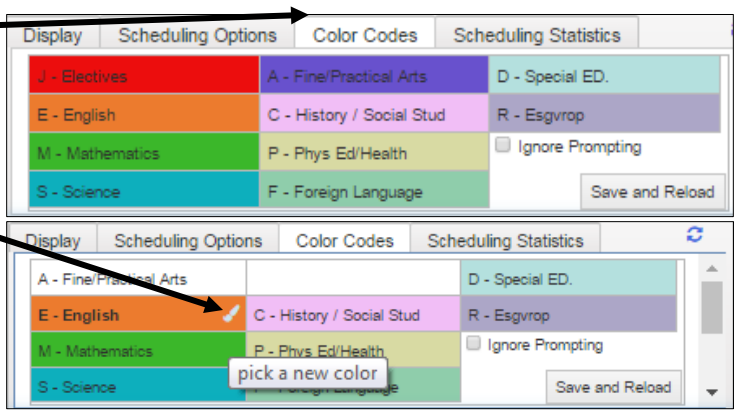
Display Settings

1. Select the **Display** tab in the top right corner. By selecting options in this area, you can change the way the SMS Board looks. Click the **Save and Reload SMS Board** to apply the changes that you have made.



2. Select the **Color Codes** tab.
3. Click on the first box (J-Electives) and select a course.
4. Hover over the box and click on the paint brush and select the desired color.

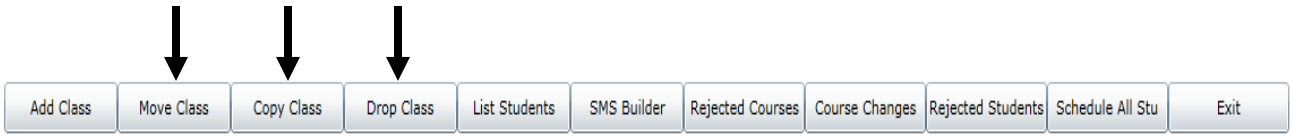
   All courses that begin with this letter will be the same color.
5. Close and click the **Save and Reload** button.



> You must check the **Show Department Colors** option on the Display tab and click the **Save and Reload SMS Board** button for the colors to appear.

Move/Copy/Delete Sections

Use the buttons at the bottom of the SMS Board to move, copy, and/or delete sections.



*You can add a section to a teacher that already exists in the window by using the **Add Class** button. Use the **Scheduling Process > Scheduling Master** window to add sections for teachers that do not appear in this window. See 2 pages down.*

MOVE

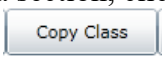
1. To **move** a section, click to select the **section**.
2. Click the 

button (bottom of screen).
3. Click where you want to place it and edit as needed.

or

Hold the section you want to move and drag it to another space on the board and drop it.
Be very careful to wait for the blue highlighting to appear in the new location before releasing the mouse button. If students are already scheduled into the section, the students will also move to the new period.

COPY

1. To **copy** a section, click to select the section.
2. Click the 

button (bottom of screen).
3. Click where you want to place the copy and edit as needed.

DELETE

1. To **delete** a section, click to select the section.
2. Click the 

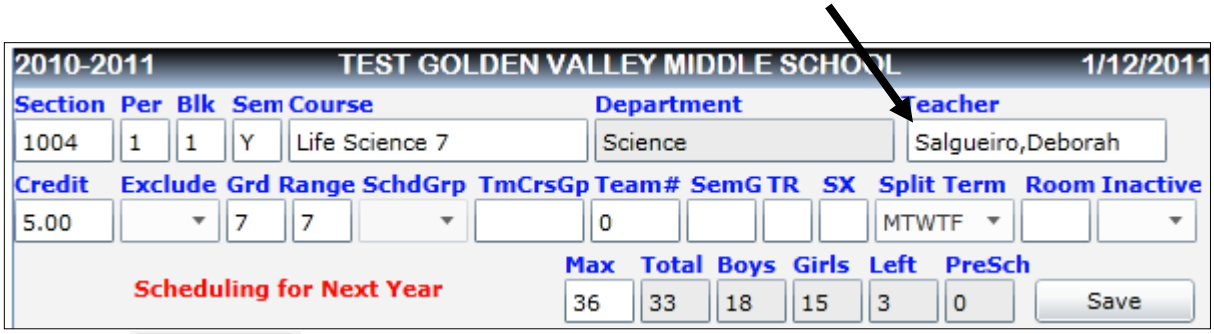
button.
3. At the **Are you sure…** message, click **Yes** to drop students.
4. At the **Drop Course Requests…** message, **click No**.

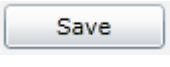
Edit a Section

1. Click to select the section (the section details appear at the top of the screen).
   Click in the desired field and make the change (e.g., Teacher, Grade Range, etc).

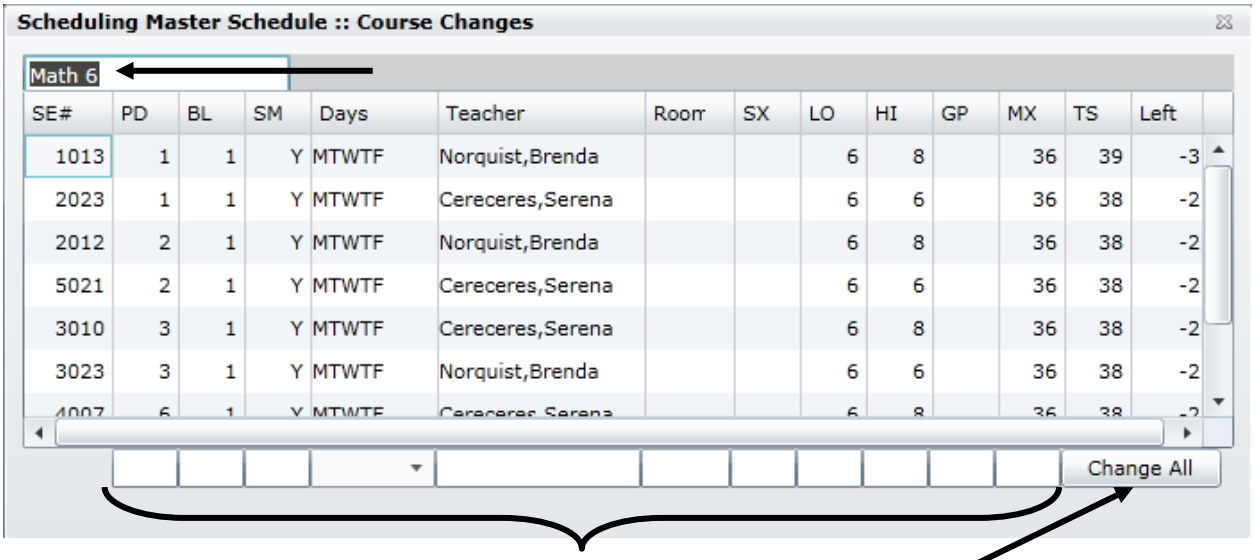
> ☝ To activate the **Teacher** drop-down list in the SMS Board screen, type at least one character of the last name into the Teacher field. To narrow the list of teachers from the list, type more characters of the last name. If you know the teacher ID, you can enter it in this field and the teacher's name will automatically appear.

> ☝ Per I.T., the new teacher list will be updated after they run promotions.



2. Click the  button to save your changes.

> ☝ To mass change a group of sections, click the **Course Changes** button at the bottom of the SMS Board screen, enter the course ID in the empty field at the top of the Course Changes window and then press [Enter]. The screen fills with sections that have been created using the course ID you typed in. Enter what you want to mass change at the bottom of the list of sections and then click the **Change All** button.



Make changes here then click **Change All**

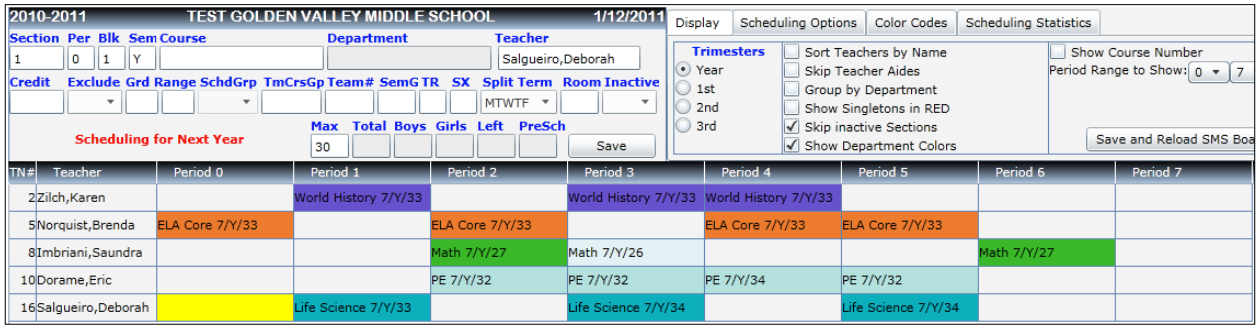
> ☝ You can also mass change sections in the Scheduling Dashboard >B. Course Requests>2. Mass Change or Add Course Requests.

Add a section

Use the steps in this section to add a section for an existing teacher.

> This method will only work if adding sections to a teacher that already appears on the SMS Board screen.

1. Click in the cell where you want the new section to appear on the board.
2. Click the Add Class button (bottom of screen).
3. At the **Add the section…** message, click **Yes** if you want to add the section to the teacher and period shown in the message box. Click **No** if you want to add it elsewhere on the board.
4. Enter the details of the section into the blank form that opened at the top of the screen.



5. Click the Save button to save your entries. The section now appears on the SMS Board.
6. When you have finished entering all your sections, run the **Scheduling Master Schedule** and **Scheduling Master Schedule Error** reports to check for errors and accuracy. The instructions to run these reports can be found in the next section (Section 2 – Creating Sections Queries and Reports).

Section 2 – Creating Section Queries and Reports

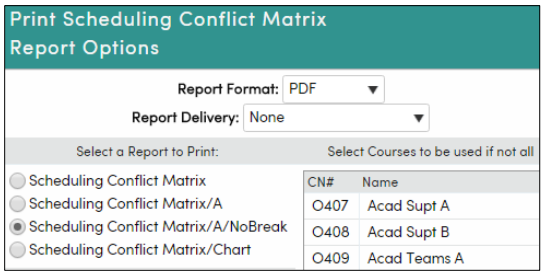
After creating all your sections, run these helpful reports to check for errors and inconsistencies. It is very important that you clean up all errors and inconsistencies so that the auto scheduler will schedule as many students as possible without rejects.

- Scheduling Conflict Matrix
- Scheduling Master Schedule Error
- Scheduling Master Schedule
- Scheduling Master Schedule Board
- Scheduling Course Request Analysis

Scheduling Conflict Matrix report

This report is useful for determining how many schedule rejects you will get if you run the auto scheduler now.

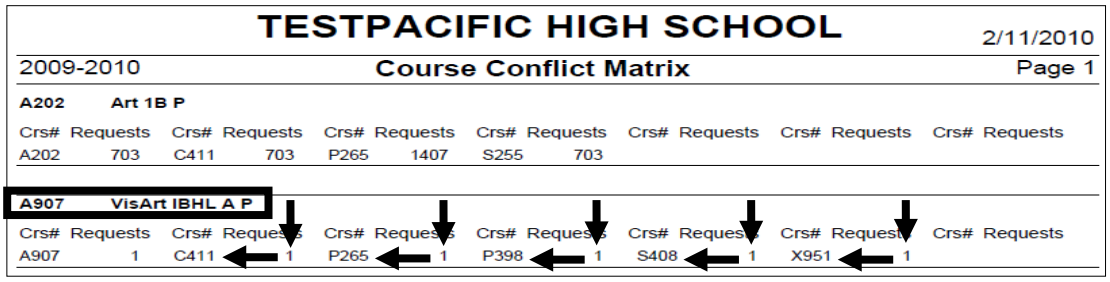
1. Click on the **Pages** icon, and then type **scheduling dashboard** into the Filter Pages field.
2. Select **Scheduling Dashboard > C. Build Scheduling Master Schedule>Scheduling Conflict Matrix** link.
3. In the **Report Format** field, make sure PDF is selected.
4. In the **Report Delivery** field, select the desired option from the drop-down list (e.g., None, Email with attachment).



5. Select the desired **Report to print** option. Scheduling Conflict Matrix/A/NoBreak is recommended.

> ☝ If you choose any object except the **Scheduling Conflict Matrix** report, the **Page break on change in course ID** option will disappear.

6. Verify that the courses you want to appear on the report are listed to the right.
7. Click the **Run Report** button.
8. At the **File Download** dialog box, click **View Report** to display the report.

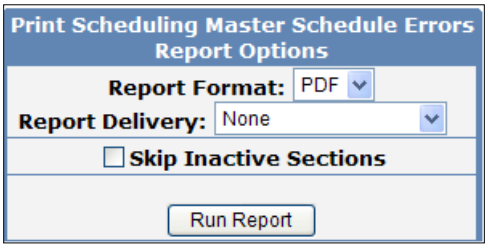


*The student(s) represented by the down pointing arrows would not be scheduled if you ran the auto scheduler now. Run the **Scheduling Reverse Verification Listing** to identify the students represented by these arrows. This report can be found in Chapter 2, Section 5 – Course Request Queries and Reports of this manual.*

9. Click the **Print** button and then **OK** if you want a hard copy of this report.
10. Close the **Adobe Acrobat** or **Excel** and **View Report** windows.

Scheduling Master Schedule Error report

After all the sections have been added, run this report to look for errors and correct them if necessary.



1. Select the **Scheduling Process > Scheduling Dashboard > C. Build Scheduling Master Schedule > Scheduling Master Schedule Errors** link.
2. In the **Report Format** field, select the desired option from the drop-down list (e.g., PDF or Excel).
3. In the **Report Delivery** field, select the desired option from the drop-down list (e.g., None, Email with attachment).
4. Click to check the **Skip Inactive Sections** option.
5. Click the **Run Report** button.
6. At the **File Download** dialog box, click **View Report** to display the report.

   If the report returns the **No problems found with semester periods** message, then your Scheduling Master Schedule is ready for students to be automatically scheduled.

2010-2011 SCHEDULING MASTER SCHEDULE - INCONSISTENT SEMESTER PERIODS Page 1

Sec#	Pd	Bl	Sem	SplitTrm	Day tags	Crs ID	Course Title	Tch#	Teacher Name	Room	Credit	Sex	Low	High	Max	Tot	Boys/Pct	Girls/Pct	Pre	Grp	Trk
2040	2	1	F	MTWTF	MTWTF-	E106	CAHSEE EngSpt A	63	Ritchie,Curtis	SE4	5.0		9	12	40	14	8 57	6 43	0		
7062	7	1	F	-TW-F	-TW-F-	E106	CAHSEE EngSpt A	61	Maier,Michael	M5A	5.0		11	12	40	14	11 79	3 21	0		

*In the above example, Crs ID E106 has an inconsistent **SplitTrm**. If all CAHSEE EngSpt classes are to be Monday through Friday, then correct Sec# 7062 to MTWTF.*

When the report displays, check all inconsistencies and, if they are wrong, **fix them before** running the auto scheduler. If they are correct, then leave them alone.

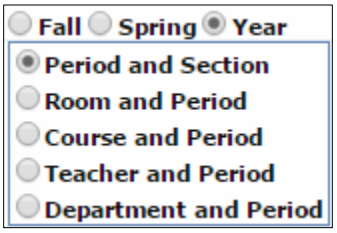
Problems to check:
Split Term: Make sure they are consistent with sections with the same course ID.
Bl(ock): Make sure they are the same for all sections of the same course ID.
Sem(ester): Make sure all sections of the same course ID have the same semester code.
Credit: Make sure there is a value in this column if this is a credit course.

7. If necessary, click the **Print** button to get a hard copy of this report.
8. Close the **Adobe Acrobat** or **Excel** and **View Report** windows.
9. After all errors are fixed, proceed to **Chapter 4 – Schedule Students**.

Scheduling Master Schedule Report

Shows the section, period, course, teacher and room.

1. Select the **Scheduling Process > Scheduling Dashboard > C. Build Scheduling Master Schedule > Scheduling Master Schedule** report shows your master schedule by:



2. Select the **options** you prefer and then **Run Report**.

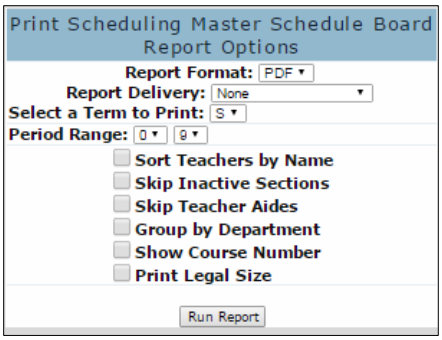
Sec#	Pd-Bl	Sm	Days	Crs ID	Course Title	Dept	Tch#	Teacher Name	Room	Credit	Sex	Low	High	Max	Tot	Boys/Pct	Girls/Pct	Pre	Sch Grp	Crs Grp	TM Nm	Sm Grp	T/A
1038	1	Y	MTWTF	A001	Beginning Art	A	7	Curwen,Henry	S-1	5.0		7	7	36	0	0 0	0 0	0					
7014	7	Y	MTWTF	A001	Beginning Art	A	7	Curwen,Henry	S-1	5.0		7	7	36	0	0 0	0 0	0					
Totals:				Seats: 72		Students Scheduled: 0				Class Average: 0				Boys: 0		Pct: 0		Girls: 0		Pct: 0			
5079	5	Y	MTWTF	A003	Advanced Art	A	7	Curwen,Henry	S-1	5.0		8	8	36	0	0 0	0 0	0					
2050	6	Y	MTWTF	A003	Advanced Art	A	7	Curwen,Henry	S-1	5.0		7	8	36	0	0 0	0 0	0					
Totals:				Seats: 72		Students Scheduled: 0				Class Average: 0				Boys: 0		Pct: 0		Girls: 0		Pct: 0			

Scheduling Master Schedule Board Report

Shows Teacher and their periods.

1. Select the **Scheduling Process > Scheduling Dashboard > C. Build Scheduling Master Schedule > Scheduling Master Schedule Board** link.

2. Select the **options** you prefer.



3. Click **Run Report**.

4. Click **View Report** to display the report.

2016-2017 **Scheduling Master Schedule - Spring** Page 1

Teacher:	Period 0	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6	Period 7	Period 8	Period 9
2 Lopez,Christopher		World Hist 7G/Y/	World Hist 7G/Y/	World Hist 7G/Y/	World Hist 7G/Y/	World Hist 7G/Y/	World Hist 7G/Y/			
3 Deetz,Michael		Amer Hist 8G/Y/	Amer Hist 8G/Y/	Amer Hist 8G/Y/	Amer Hist 8G/Y/		Amer Hist 8G/Y/	Amer Hist 8G/Y/	Math 8 Support/	
4 Dondalski,Jennifer		Reading 7G/Y/0	Lang Arts UA 7G	Reading 7G/Y/0	Lang Arts UA 7G	Reading 7G/Y/0	Lang Arts UA 7G			
5 Tetlock,Pamela		Math 7 GATE/Y/	CCSS Math 7 Ac	CCSS Math 7 Ac	Math 7 GATE/Y/	Math 7 GATE/Y/	Math 7 GATE/Y/			
6 Esparza,Sonia		Span 1 MYP A/Y	Span 1 MYP B/Y	Span 1 MYP A/Y	SpanLit Nat MYP	Span 1 MYP B/Y		SpanLit Nat MYP	Span 1 MYP A/Y	
7 Curwen,Henry		Beginning Art/Y/		ExploElective 1/		Advanced Art/Y/	Advanced Art/Y/	Beginning Art/Y/		
8 Ryker,Ryan		ELA Core 8L/Y/0	Lang Arts UA 8G	Reading 8G/Y/0	Lang Arts UA 8G		Reading 8G/Y/0	Lang Arts UA 8G	Lang Arts UA Sp	
8 Ryker,Ryan		Reading 8G/Y/0								

Prescheduling Edit Listing Report

After Sections have been created, this shows student's Course Requests and what period they would be scheduled into if you ran the Auto Scheduler now.
If the student is not able to be put into a Section or Course, this will also give you the reason why.
No options for this report, so it is advised to use a KEEP statement by grade, course, student, etc.

1. Select the **Scheduling Process > Scheduling Dashboard > C. Build Scheduling Master Schedule > Prescheduling Edit Listing** link.
2. Click **Run Report**.
3. Click **View Report** to display the report.

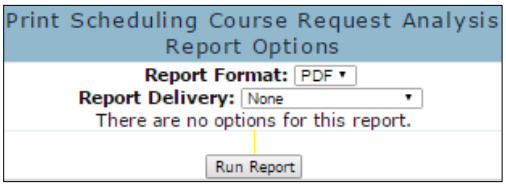
2018-2019 **PRESCHEDULING EDIT LISTING** Page 1

Student Name	Grd	Gender	STUID	Crs.	Course Title	Per		Comments
lema	10	Female	410	Invalid course ID/not in master schedule				
				E465	Academic ELD 3A	———	I	*** Invalid Course ***
				S408	Chem 1C A P	—F—		
				E422	Eng 2C L A P	———	I	*** Invalid Course ***
				P203	PE Survey 2A	—A—		
				C411	Wld Hist C A P	-A—		
	Li	10	Female	360	No course requests			

Scheduling Course Request Analysis

Run the Scheduling Course Request Analysis report after you have created all sections. This report will show you how many course requests you have and how many seats you have created to match the number of course requests you have entered. If the figures do not match, you will have to increase or decrease the number of sections you have created or change a student's course request to match available sections.

1. Select the **Scheduling Process > Scheduling Dashboard > C. Build Scheduling Master Schedule > Scheduling Course Request Analysis** link.
2. In the **Report Format** field, select the desired option from the drop-down list (e.g., PDF or Excel).
3. In the **Report Delivery** field, select the desired option from the drop-down list (e.g., None, Email with attachment).



4. Click the **Run Report** button.
5. Click **View Report** to display the report.

There are 828 seats (24 sections) created in the scheduling master however you only have 450 course requests. You need to reduce the number of sections in the scheduling master so the Reqs/Sec value increases to 34 (Avg Size).

2010-2011 **TEST GOLDEN VALLEY MIDDLE SCHOOL** 3/18/2011

COURSE REQUEST ANALYSIS Page 1

Course Number and Title		Total Requests	Total Seats	Seats Short	Total Sections	Average Size	Requests / Section	Actual Rejects
C021	World History 7	165	0	165	0	0		165
C023	World Hist 7MYP	0	90		3	30	0	
C031	American Hist 8	450	828		24	34	19	
E041	ELA Core 7	165	0	165	0	0		
E062	ELA Core 8G	330	360		12	30	28	
M021	Math 7	165	0	165	0	0		165
M033	Algebra 1	450	480		16	30	28	
P007	PE 7	165	0	165	0	0		165
P008	PE 8	450	480		16	30	28	
S022	Life Science 7	165	0	165	0	0		165
S032	Physical Sci 8	450	510		23	22	20	

These two values should match or come close to matching.

There are 0 seats (0 sections) created in the scheduling master however you have 165 course requests. You need to create enough sections to accommodate the 165 course requests.

Chapter 4 - Schedule Students

Topics covered in this chapter:

Section 1:

--Auto Schedule Students

--Backup scheduling results (initial)

--Schedule All Students (Scheduling Master window)

--Locking and unlocking student schedules

--Backup/Restore scheduling results (subsequent)

--Troubleshooting scheduling error messages

--Schedule All Students (SMS Board)

--Scheduling Optimizer

Section 2:

--Scheduling Students Queries and Reports

Section 3:

--Solve balance, conflict, and reject issues

Section 4:

--Copy SMS and SSS tables into the MST and Sec tables

Section 1 – Auto Schedule Students into Sections

If you setup Course Requests for all (or most) of your students, you are ready to automatically schedule students into the newly built Scheduling Master Schedule. Make sure you have completed the steps in Chapter 2 – Enter Course Requests and
Chapter 3 – Create Sections before scheduling students.

> **Exclusions for students** based on teacher, period, or other students, can be setup using the Course Request>Scheduling Exclusions option and should be done before scheduling students.

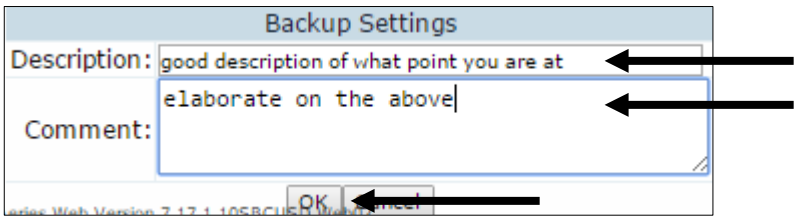
> If you are using houses, academies, or families, make sure the **SchdGrp** and/or **TmCrsGp** and **Team#** fields are populated correctly before scheduling students.

> For assistance with creating groups (courses and/or student groups), watch the training videos: http://www.aeries.com/training-support/support-videos **SUPPORT VIDEOS** to **Scheduling**.
>
> Refer to the **How to use SchdGrp, TmCrsGp and Team# fields to schedule students** in the **Appendix** for additional ways in which to control how the auto scheduler places students into sections.

Backup Scheduling Results

Before running the auto scheduler for the first time, run the Backup Scheduling Results command so you can return the Scheduling Master to its original state if you are not happy with the first scheduling results.

1. From the Navigation Tree, click on the **Scheduling Process > Scheduling Dashboard > D. Schedule Students >*Backup and Restore Scheduling Results**.



A list of previous backups appears (if any have been done in the past).

2. Click the **Backup Current Scheduling Tables (SMS and SSS)** button.
3. In the **Description** field, enter a name for the most recent scheduling results.
4. In the **Comment** field, enter a description for the above.
5. Click **OK** to complete the save command. At the **Are you sure…** message, click **OK**. The newly saved results will now appear on in this window, along with previous backups.

Scheduling Backups

Seq	Date/Time	Description	Tot Stus	Crs Reqs	Rejects
1	2/23/2011 11:11 AM	Auto Scheduling 1st Attempt	612	1526	159
		Ran on 05/15/2011			

Two ways to auto schedule all students into sections

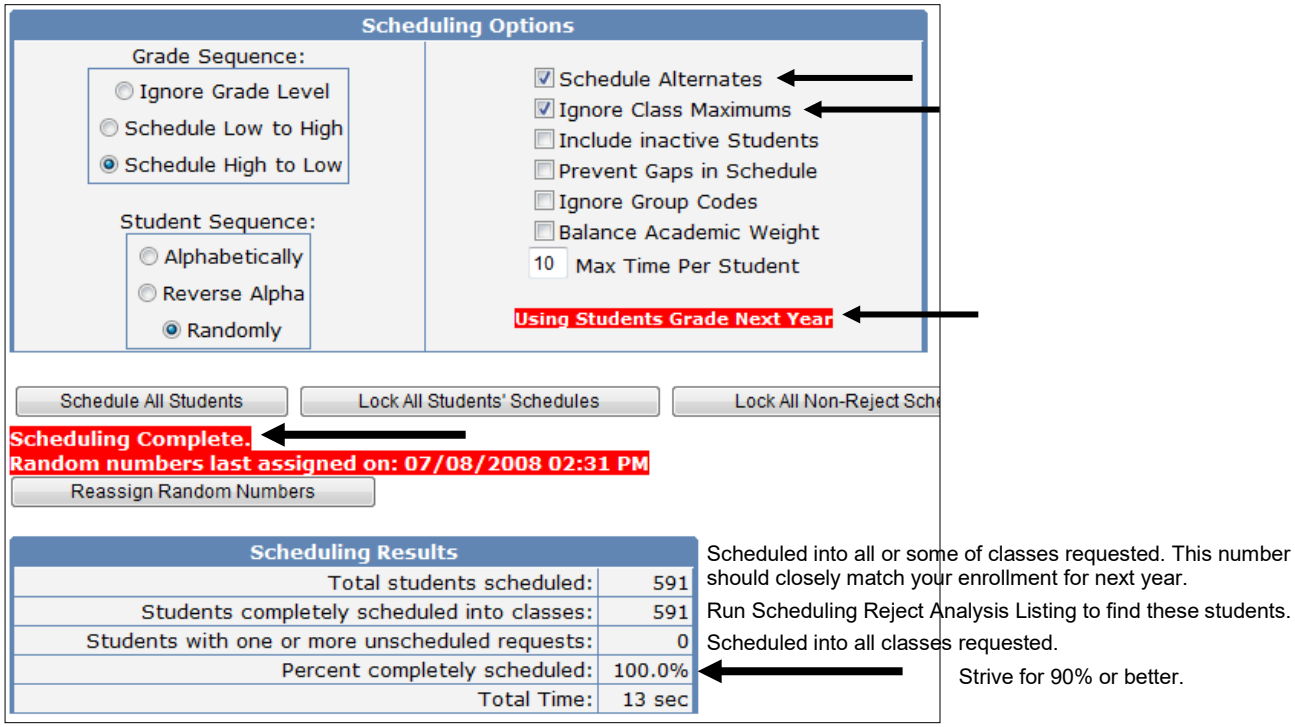
- Schedule All Students window
- Using the SMS Board for all students

1st Option: Schedule ALL Students Window

1. Click on the **Pages** icon, and then type **scheduling dashboard** into the Filter Pages field.
2. Select **Scheduling Dashboard >D. Scheduling Students > Schedule All Students.**
3. In the **Grade Sequence** area, select the **Schedule High to Low** option.
4. In the **Student Sequence** area, select the **Randomly** option.
5. In the options listed to the right of this screen, select the **Schedule Alternates** and **Ignore Class Maximums** options.
6. Verify that **Using Students Grade Next Year** appears in the window (highlighted in red).
7. Click the Schedule All Students button to start the auto scheduler. **Please be patient as this may take a while based on how many students there are in your database.**

> If you get an error message at the first run, restore the backup you created on the previous page, fix the problem stated in the error message, and then run the auto scheduler again.

8. At the **Success** message, click **OK**.



9. Study the **Scheduling Statistics** results at the bottom of the screen. You should strive for approximately 90% or better in the **Percent completely scheduled** area.

> ☝ To increase this percentage, tweak your Scheduling Master by 1) adding enough sections, deleting, or changing the details of each section, 2) changing course requests, and/or 3) locking sections within a student's **Student Data > Scheduling > Course Requests / Schedule** screen and then run the auto scheduler again.

> ☝ The reports featured in **Section 2 – Scheduling Students Queries and Reports** will also help you determine where your Scheduling Master needs tweaking.

10. If you want to **lock student schedules** that have been successfully scheduled before running the auto scheduler again, follow the steps under **Locking All Student Schedules** that begin on the next page.

> ☝ For a list of **error messages** and how to troubleshoot them, see the **Troubleshooting Error Messages** below.

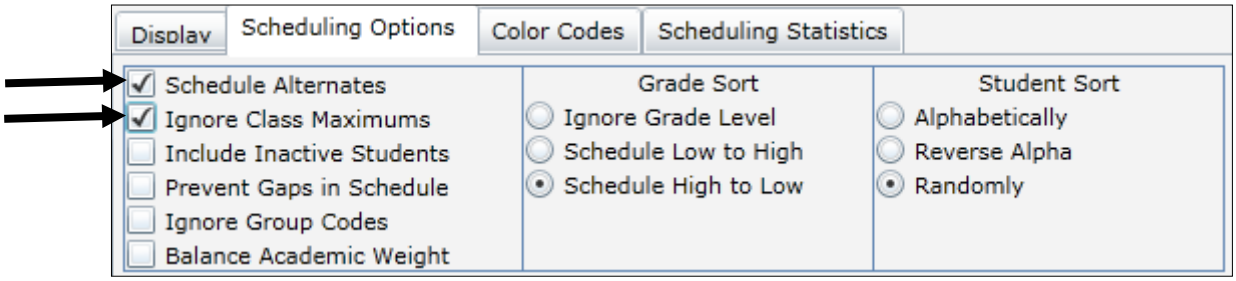
2nd Option: SMS Board Window

The other place you can run the auto scheduler is from the SMS Board.
Remember to run the Backup Scheduling Results command so you can return the Scheduling Master to its original state if you are not happy with the first scheduling results.

1. Click on the **Pages** icon, and then type **SMS** into the Filter Pages field.
2. Select **SMS Board**.
3. Click on the **Scheduling Options** tab (top right area of screen).

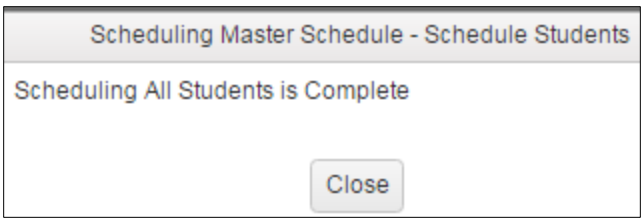
> ☝ If this area is missing, contact the I.T. Security Specialist at 386-2550 and request rights to use this screen.

4. Select the **Schedule Alternates** and **Ignore Class maximums** from the first column.
5. From the **Grade Sort** column, select **Schedule High to Low**.
6. From the **Student Sort** column, select **Randomly**.



7. Click the Save and Reload button.
8. Click on the Schedule Students button (bottom of screen).
9. At the **Are you sure you want to schedule all students into new classes?** message, click **Yes**. The **Running…** button will be grayed out indicating that the scheduler is working.

   Please be patient as this may take a while based on how many students that are in your database.



10. Click the **Close** button.

11. Click the **Scheduling Statistics** tab (top right corner of screen) and study the scheduling results**.** You should strive for approximately 90% or better in the **Percent completely scheduled** area.

Scheduling Results	
Total students scheduled:	590
Students completely scheduled into classes:	542
Students with one or more unscheduled requests:	48
Percent completely scheduled:	91.9%
Total Time:	12 sec

Scheduled into all or some of classes requested. This number should closely match your enrollment for next year.

Scheduled into all requested classes.

Run Scheduling Reject Analysis Listing to find these students. Strive for 90% or better.

> To increase this percentage, tweak your Scheduling Master by 1) adding, deleting, or changing the details of each section, 2) changing course requests, and/or 3) locking sections within a student's **Student Data > Scheduling > Course Request / Schedule** screen and then run the auto scheduler again.

> The reports featured in **Section 2 – Scheduling Students Queries and Reports** (Scheduling Class Load Analysis, Scheduling Class Load Averages, and Scheduling Reject Analysis Listing) will also help you determine where your Scheduling Master needs tweaking. This section begins below.

12. If you want to save this scheduling run, follow the **Backup Scheduling Results** steps.

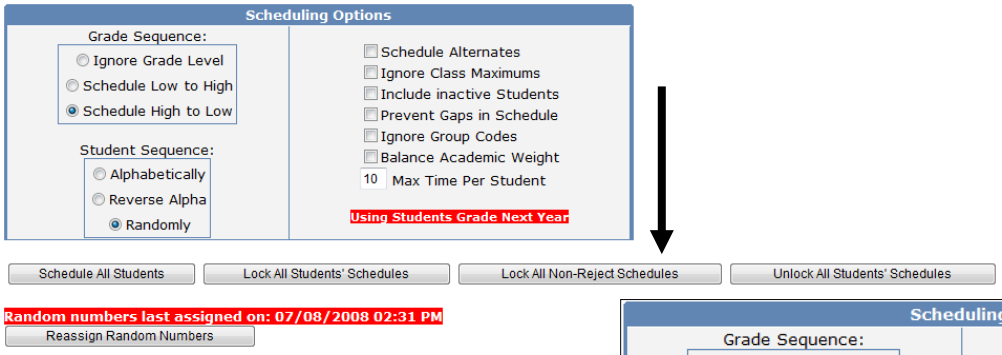
13. Click the Exit button (very bottom right corner) to close the SMS Board screen.

> If the **Exit** button is not visible, you may need to scroll down, then to the right to find additional scroll bars that will help you find this button.

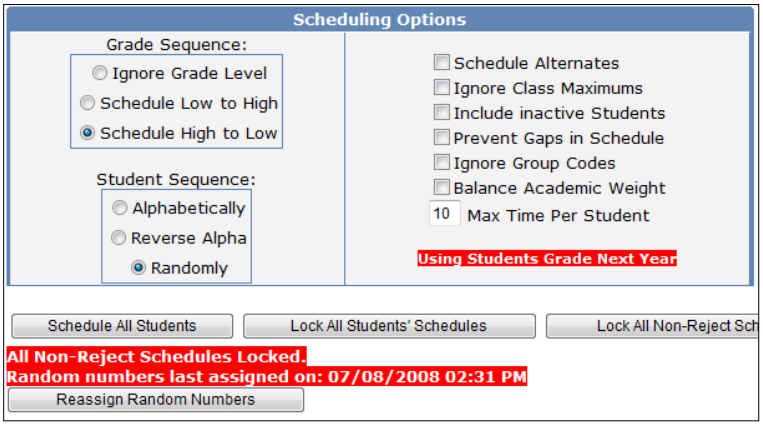
Locking All Students' Schedules

If you plan to run the auto scheduler again after tweaking the Scheduling Master from the last scheduling run, you may want to lock the student schedules that have been successfully scheduled before running the auto scheduler again. Follow these steps to lock student schedules.

1. Click on the **Pages** icon, and then type **scheduling dashboard** into the Filter Pages field.
2. Select **Scheduling Dashboard > C. Build Scheduling Master Schedule >Schedule All Students** link. The results of the last scheduling run or the results from the last restored scheduling results will be what you will be locking
3. Click on the **Lock All Non-Rejected Schedules** button. All classes that were successfully scheduled will be locked.



4. At the **LOCK ALL students WITH NO REJECTS…** message, click the **OK** button. The **All Non-Reject Schedules Locked** message appears.



5. Tweak your Scheduling Master to try to accommodate the rejected schedules and then run the auto scheduler again. Follow the instructions in **Section 1 - Schedule All Students** to auto schedule the students that are not locked.

	Crs ID	Course Title	0123456789	Prf	Teacher Name	Meets	AltCrs	Sec#	Per	Trm	Tr	SG	GP	CG	Tm#	Reject	PermLk	ALL
	C606	US Hist C A P	----AAAAAA	000				0										
	E620	English 3C A P	AAAAAAAAAA	000				0								*LOCKED*		
	M730	Algebra 1E ED A	AA--------	000				0								*LOCKED*		
	S262	Biology 1C B P	--XAAA----	000	Gutierrez,Aundrea	MTWTF		2030	2	2		A	1		0	*LOCKED*		

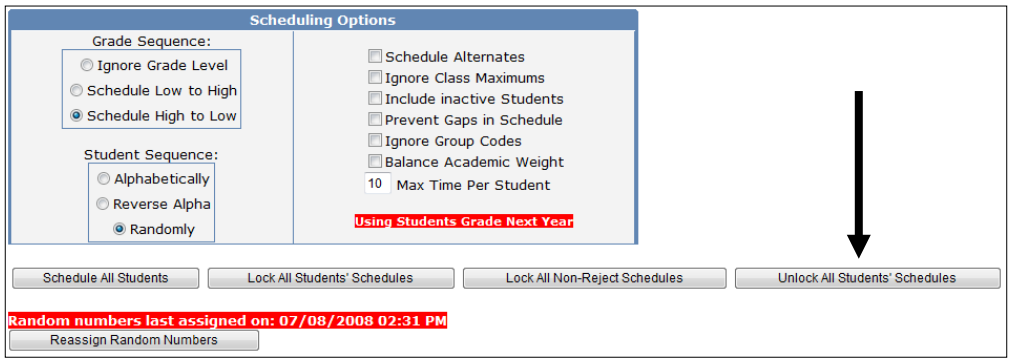
Add New Record Add Many New Records Add From Course Request Sheet Table

> If you want to **lock all students in a specific section number**, contact Information Technology and they will lock them for you.

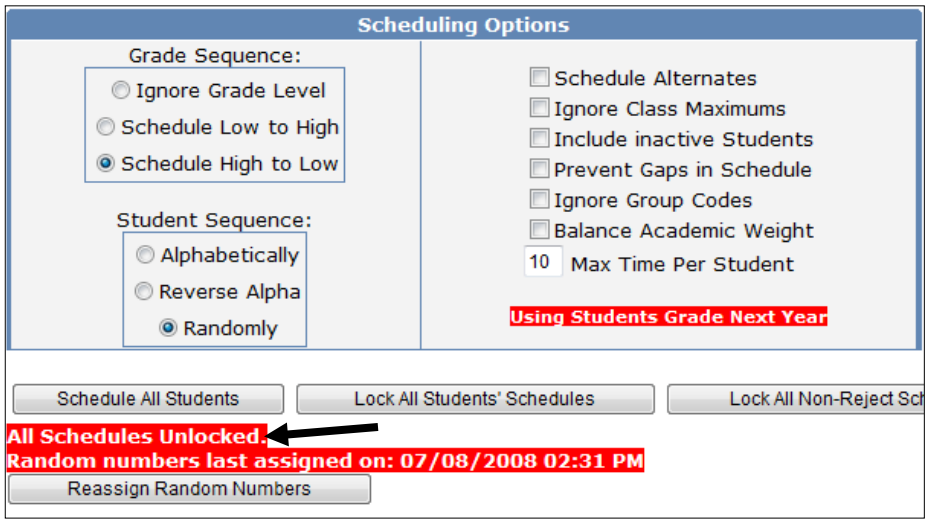
Unlocking Students Schedules

If you want to start from scratch to auto schedule your students again, unlock students who have been successfully scheduled so they will be rescheduled along with all the other students.

1. Click on the **Pages** icon, and then type the word **ALL** into the Filter Pages field.
2. Select **Schedule All Students**.
3. Click on the **Unlock All Students' Schedules** button.



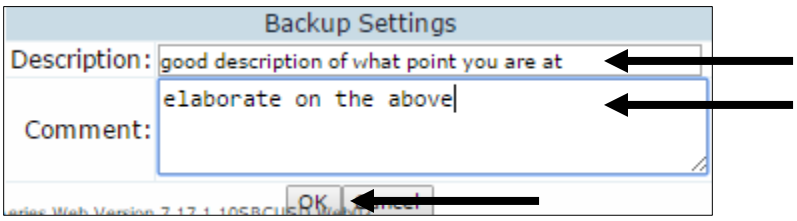
4. At the **Unlock ALL students…** message, click the **OK** button. The **All Schedules Unlocked** message appears.



Backup Scheduling Results

If you are reasonably happy with the scheduling results, save the results so that you can restore them if a subsequent scheduling run is not satisfactory.

1. Click on the **Pages** icon, and then type **Backup** into the Filter Pages field.
2. Select the **Backup and Restore Scheduling Results** link on the Navigation Tree. A list of previous backups appears.
3. Click the **Backup Current Scheduling (SMS and SSS)** button.
4. In the **Description** field, enter a name for the most recent scheduling results.
5. In the **Comment** field, enter a description for the above.



6. Click **OK** to complete the save command. At the **Are you sure…** message, click **OK**. The newly saved results will now appear on in this window, along with previous backups.

Scheduling Backups					
Seq	Date/Time	Description	Tot Stus	Crs Reqs	Rejects
1	2/23/2011 11:11 AM	Auto Scheduling 1st Attempt	612	1526	159
		Ran on 05/15/2011			

Restore Scheduling Results

If you are not happy with a subsequent scheduling run, restore one of your previous backups.

1. If necessary, exit the **SMS Board** screen.
2. Click on the **Pages** icon, and then type **Backup** into the Filter Pages field.
3. Select the **Backup and Restore Scheduling Results** link.
4. Click to select the desired scheduling results record that you want to restore. The selected record appears highlighted in blue.
5. Click on the **Restore SSS and SMS tables from Selected Backup** button.

Scheduling Backups					
Seq	Date/Time	Description	Tot Stus	Crs Reqs	Rejects
1	2/23/2011 11:11 AM	Auto Scheduling 1st Attempt	612	1526	159
		Ran on 05/15/2011			

Backup Current Scheduling Tables (SSS and SMS) | Restore SSS and SMS tables from Selected Backup | Delete Selected Backup

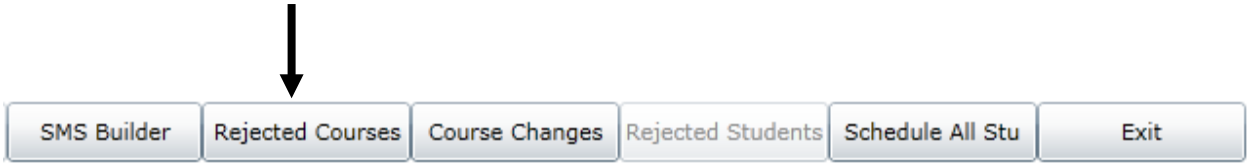
6. At the **Are you sure…** message, click **OK**. You will see this message when completed.

Scheduling Tables Restored Successfully.

Troubleshooting Error Messages

After running the auto scheduler, follow the steps in this section to troubleshoot error messages that will assist you in tweaking your Scheduling Master.

1. Click on the **Scheduling Process > Scheduling Dashboard > C. Build Scheduling Master Schedule > SMS Board** link.
2. Click the **Rejected Courses** button to find errors dealing with sections and course request mismatches and students that did not get scheduled.

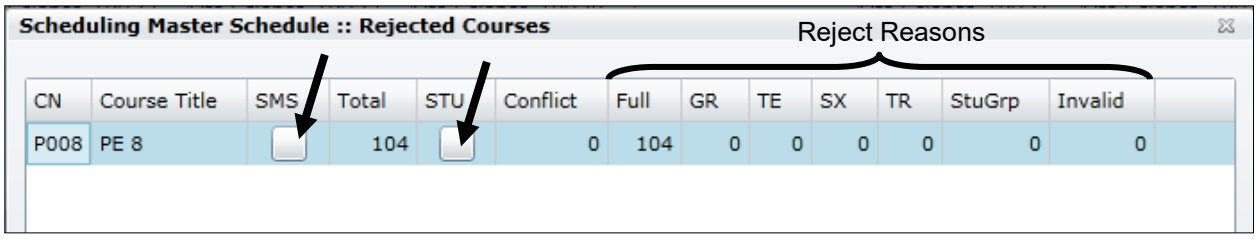


Rejected Courses

Courses listed in this screen have a course request but do not have any matching sections in the Scheduling Master or SMS Board screens.

Click on the **SMS** button to display a list of sections that have been created for the course.

Click on the **STU** button to display a list of students who have not been scheduled into the listed course.

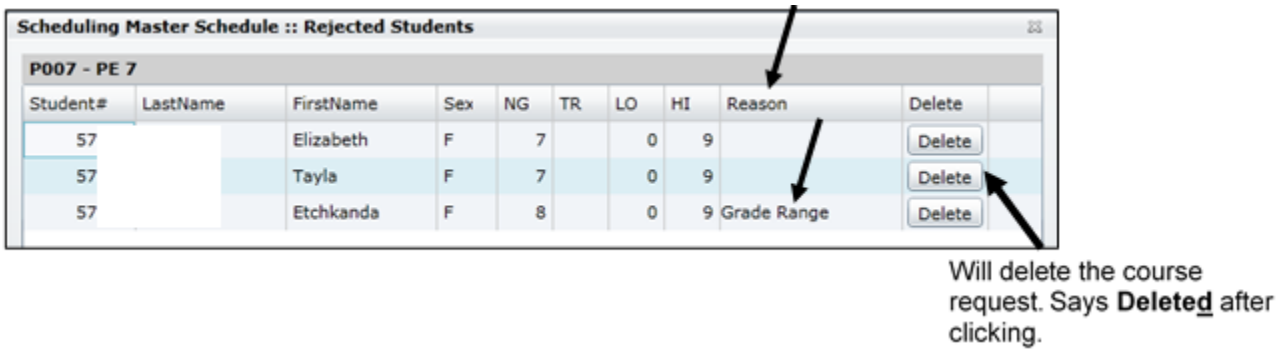


Reject Reasons:

Full *= class is full*
GR *= Wrong Grade*
TE *= Preferred Teacher not available*
SX *= Wrong Sex*
StuGrp *= Does not match SchdGrp*
Invalid *= No section(s) exist for course request.*

Rejected Students

*After you click the **STU** button, the Rejected Students screen appears. Look in the Reason column to find out why the student was rejected. Follow the guide on the next page to determine how to fix the error.*

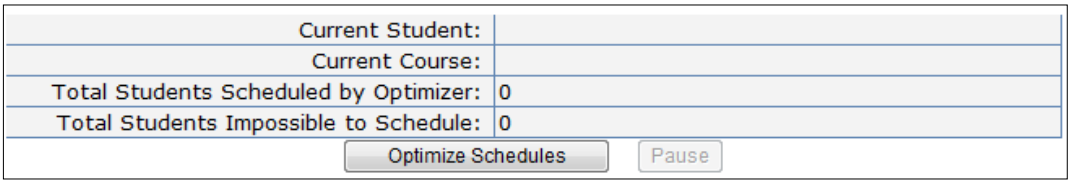


Reason	What it means	How to fix it
Grade Range	Course request is for a grade different than student's next grade.	Navigate to the student's **Course Request / Class Scheduling** screen and edit the rejected course to a course that is within the correct grade range.
Invalid Course	No section has been created in SMS for course request.	Navigate to the **Scheduling > Scheduling Master** or **SMS Board** screen and create a section(s) for the course.
Full Classes	There are not enough sections to accommodate course requests.	Navigate to the **Scheduling > Scheduling Master** or **SMS Board** screen and add more sections of the same course.
Conflict	Student was not scheduled because it conflicts with another course offered during the same period.	Manually schedule student into all of their classes via the **Stu Data > Scheduling > Course Req / Class Scheduling** screen or add more sections into other periods.

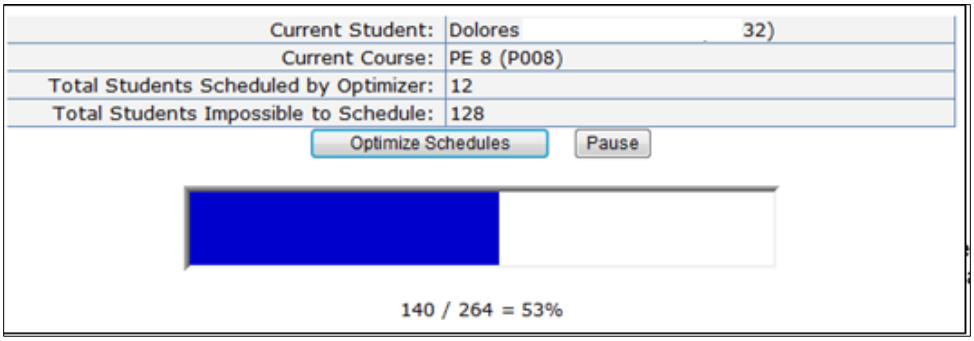
Scheduling Optimizer

Another feature that will assist with optimizing your Scheduling Master is to use the Scheduling Optimizer. This process tries some student schedule changes to see if some errors can be resolved. Follow these steps to run the Scheduling Optimizer command.

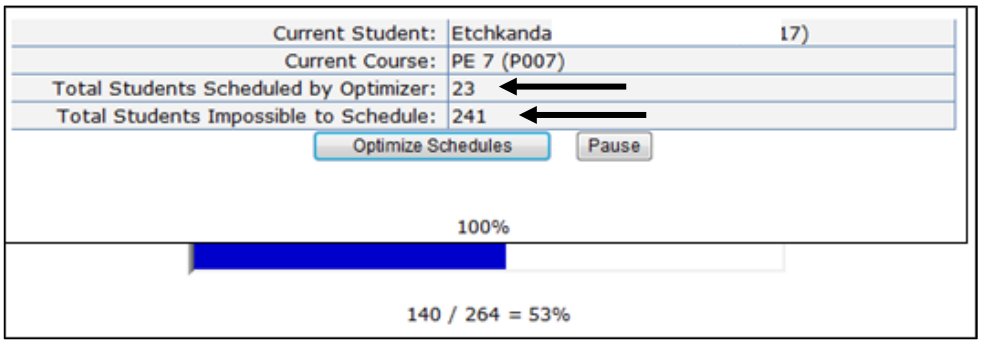
1. Click on the **Pages** icon, and then type **Optimizer** into the Filter Pages field.
2. Select **Scheduling Optimizer**.



3. Click on the **Optimize Schedules** button. The status of the optimizer displays showing the process.



4. At the **Done** message, click **OK**. The results of the optimizer display.



The optimizer rescheduled 23 additional students and was not able to reschedule 241 students.

Manually add Sections/Courses for one student (Scheduling Master)

Use these steps if your scheduling data is setting in the Scheduling Master screen and you want to manually place a student into a specific section/course.

1. Select the desired student.
2. Click on the **Pages** icon in the Navigation Tree.
3. Type the word **request** in the Filter Pages…..field.
4. Click on the **Course Request/ Schedule** link.
5. Make sure you are on the **Course Request** tab.
6. Click **Add New Record** or **Add Many New Records**.
7. Type in the **Section** number or the **Course ID** if you will use reschedule to auto assign a section.

> If the Auto Scheduler has already run, the Section # field(s) will display a value. If it has not run, the Section # field(s) will be blank.

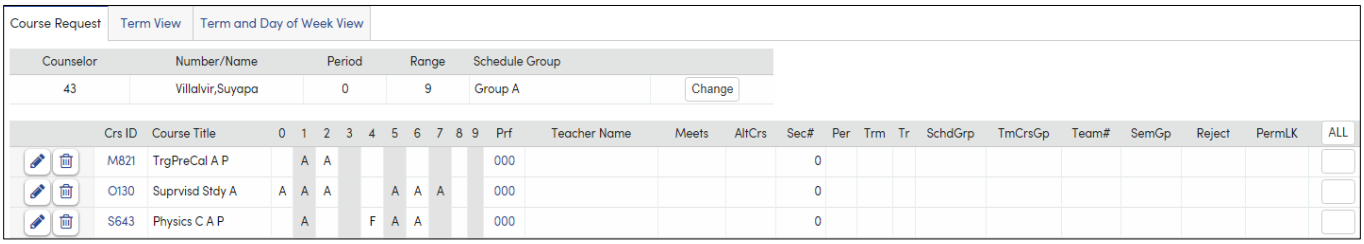
If you know the course ID, type it in the blank field using Capitol Letter.

If you don't know the course ID, click here and type a partial course description and then click Search.

8. Click the Floppy Disk to **SAVE**. If entering using Add Many New Records, click save after entering all Course ID's.

> If they already have sections assigned and you want them to stay, make sure to LOCK them before Rescheduling.

9. If you used Coureses, click the **Reschedule** button (bottom of screen) to auto schedule the student into section(s).
10. Review the **Reject** column to make sure all the courses were added.



Course Request | Term View | Term and Day of Week View

Counselor	Number/Name	Period	Range	Schedule Group	
43	Villalvir,Suyapa	0	9	Group A	Change

	Crs ID	Course Title	0	1	2	3	4	5	6	7	8	9	Prf	Teacher Name	Meets	AltCrs	Sec#	Per	Trm	Tr	SchdGrp	TmCrsGp	Team#	SemGp	Reject	PermLK	ALL
	M821	TrgPreCal A P		A	A								000				0										
	O130	Suprvisd Stdy A	A	A	A			A	A	A			000				0										
	S643	Physics C A P		A			F	A	A				000				0										

In the example above, these 3 courses were rejected and did not get scheduled because there were no sections, or no seats available in a period this student had open. Therefore, you will need to fix the Sections and then try rescheduling again.

11. **Repeat** the above steps until all Course ID's have been entered.

> You can also use the Course Request Packet button. Make sure to use the Reschedule button to assign the sections.

Change a Section in a student's schedule (Scheduling Master)

1. Select the desired student.
2. Follow the instructions above to #4.
3. And then click on the **Edit** button to the left of the desired section.
4. Click in the **Sec#** field and enter the desired section number.

   If you opened the View SMS window earlier, click its button at the bottom of the screen to reopen the window to find Course (or section) numbers.

   > Do not select a section from within the View SMS window. Doing so will add the section and not replace the previous section. Note the correct section number and then minimize or close the View SMS window

5. Click the **Save** button to save the change(s) you made.
6. Make sure the previous section number is gone.

If you are changing the course, delete the one not needed and add a new record for the new course.

Delete a section from a student's schedule (Scheduling Master)

1. Select the desired student.
2. Follow the instructions for Manually Add Sections to one Student above to #4.
3. Click on the trash can icon button to the left of the desired section.
4. At the **Are you sure you want to delete this record?** message, click **YES**.

   Make sure the section number is gone.

Section 2 – Scheduling Students Queries and Reports

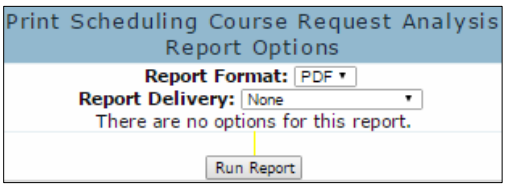
Now that the students are scheduled into the various sections, you will need to run a few reports to analyze the results and, if necessary make changes.

- Scheduling Course Request Analysis
- Scheduling Class Load Analysis
- Scheduling Class Load Averages
- Scheduling Reject Analysis Listing
- Students with Double Periods
- Students with Incomplete Class Schedules
- Students with more or less Than N Periods

Scheduling Course Request Analysis Report

Run the Scheduling Course Request Analysis report after you have created all sections. This report will show you how many course requests you have and how many seats you have created to match the number of course requests you have entered. If the figures do not match, you will have to increase or decrease the number of sections you have created or change a student's course request to match available sections.

1. Select the **Scheduling Process > Scheduling Dashboard > C. Build Scheduling Master Schedule > Scheduling Course Request Analysis** link.
2. In the **Report Format** field, select the desired option from the drop-down list (e.g., PDF or Excel).
3. In the **Report Delivery** field, select the desired option from the drop-down list (e.g., None, Email with attachment).



4. Click the **Run Report** button.
5. Click **View Report** to display the report.

There are 828 seats (24 sections) created in the scheduling master however you only have 450 course requests. You need to reduce the number of sections in the scheduling master so the Reqs/Sec value increases to 34 (Avg Size).

2010-2011 **TEST GOLDEN VALLEY MIDDLE SCHOOL** 3/18/2011

COURSE REQUEST ANALYSIS Page 1

Course Number and Title		Total Requests	Total Seats	Seats Short	Total Sections	Average Size	Requests / Section	Actual Rejects
C021	World History 7	165	0	165	0	0		165
C023	World Hist 7MYP	0	90		3	30	0	
C031	American Hist 8	450	828		24	34	19	
E041	ELA Core 7	165	0	165	0	0		
E062	ELA Core 8G	330	360		12	30	28	
M021	Math 7	165	0	165	0	0		165
M033	Algebra 1	450	480		16	30	28	
P007	PE 7	165	0	165	0	0		165
P008	PE 8	450	480		16	30	28	
S022	Life Science 7	165	0	165	0	0		165
S032	Physical Sci 8	450	510		23	22	20	

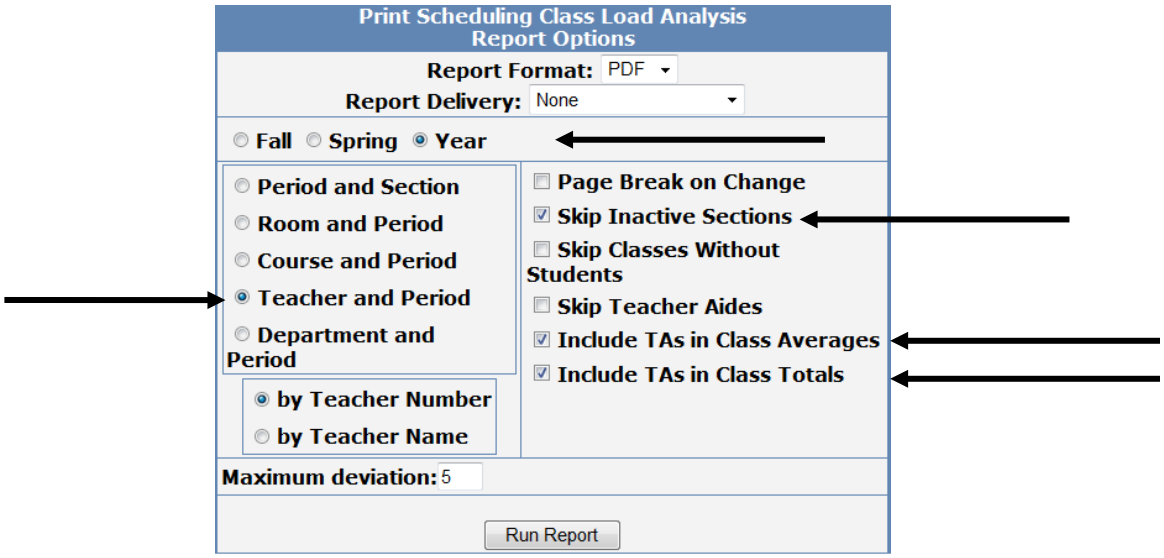
These two values should match or come close to matching.

There are 0 seats (0 sections) created in the scheduling master however you have 165 course requests. You need to create enough sections to accommodate the 165 course requests.

Scheduling Class Load Analysis report

The Class Load Analysis report will verify the effectiveness of your class size balance especially when using the Ignore Maximum option.

1. Select the **Scheduling Process > Scheduling Dashboard > D. Schedule Students > Class Load Analysis** link.



2. In the **Report Format** field, select the desired option from the drop-down list (e.g., PDF or EXL).
3. In the **Report Delivery** field, select the desired option from the drop-down list (e.g., None).
4. Select **Fall**, **Spring**, or **Year** to tell Aeries if you want to analyze the first semester (high school), second semester (high school) or entire year (middle school).
5. Select the **Teacher and Period** option from the left column.
6. Select **Skip Inactive Sections**, **Include TAs in Class Averages** (teacher aides), and **Include TAs in Class Totals** from the right column.
7. In the **Maximum deviation** field, verify that **5** appears.
8. Click the **Run Report** button.
9. Click the **View Report** button.

   The report now appears in the Adobe Acrobat window. Refer to the sample report on the next page for information about how to interpret this report.

Maximum seats available

Number of students scheduled

(-) Seats over max

Screaming Eagle High School 11/2 /2007 01:40:08 PM

2006-2007 **CLASS LOAD ANALYSIS BY TEACHER AND PERIOD** Page 1

Sec#	Pd	Sm	Days	Crs ID	Course Title	Tch#	Name	Rm	Crd	Sm Grp	Sch Grp	Crs Grp	Tm Nm	Sz	Range	Max	Total	Boys	Girls	9	10	11	12	Left	Dev
																		Scheduling Using Next Years Grades							
0636	1	Y	MTWTF	0301	English 9CP	605	Acosta	E2	5.0					9	12	22	7	3	4	7	0	0	0	15	0.3
0686	1	Y	MTWTF	1500	Tch rAide	605	Acosta	E2	5.0					11	12	0	1	0	1	0	0	1	0	-1	0.3
0628	2	Y	MTWTF	0301	English 9CP	605	Acosta	E2	5.0					9	12	22	7	3	4	7	0	0	0	15	0.3
0687	2	Y	MTWTF	1500	Tch rAide	605	Acosta	E2	5.0					11	12	0	1	1	0	0	0	1	0	-1	0.3
0617	3	Y	MTWTF	0715	Hon EconGovtGS	605	Acosta	E2	5.0					12	12	42	37	17	20	0	0	0	37	5	0.0
0689	3	Y	MTWTF	1500	Tch rAide	605	Acosta	E2	5.0					11	12	0	0	0	0	0	0	0	0	0	0.0
0307	4	Y	MTWTF	0301	English 9CP	605	Acosta	E2	5.0					9	12	22	7	4	3	7	0	0	0	15	0.3
0690	4	Y	MTWTF	1500	Tch rAide	605	Acosta	E2	5.0					11	12	0	1	1	0	0	0	1	0	-1	0.3
1521	5	Y	MTWTF	1500	Tch rAide	605	Acosta	E2	5.0					11	12	0	0	0	0	0	0	0	0	0	0.0
1610	5	Y	MTWTF	0301	English 9CP	605	Acosta	E2	5.0					9	12	22	7	3	4	7	0	0	0	15	0.3
									Class Average:					6.8		130	68	32	36	28	0	3	37	6.2	0.2

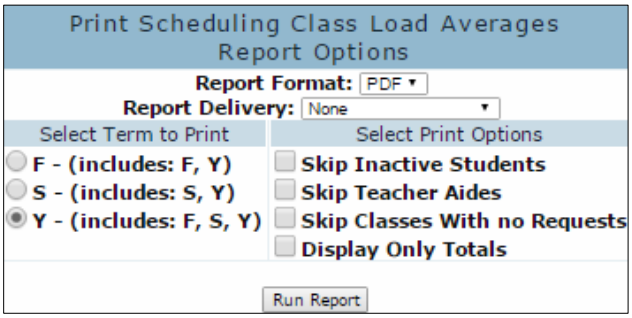
In this example, you may want to delete this section and schedule the 7 students into another section.

10. If necessary, click the **Print** and **OK** button to get a hard copy of this report.
11. Click the **Close** button to close the **Adobe Acrobat** or **Excel** window.
12. Click the **Close** button to close the **Report Viewer** window. The Class Load Analysis options screen reappears.

Scheduling Class Load Averages report

Run this report to view the balance of course requests between males, females, and grade levels.

1. Select the **Scheduling Process > Scheduling Dashboard > D. Schedule Students > Class Load Averages** link.
2. In the **Report Format** field, select the desired option from the drop-down list (e.g, PDF or Excel).
3. In the **Report Delivery** field, select the desired option from the drop-down list (e.g., Email w/o attachment or None).



4. **Select Term to Print**.
5. **Select printing options.**
6. Click the **Run Report** button.
7. Click the **Open** button.

The report now appears in the Adobe Acrobat or Excel window. Refer to the sample report on the next page for information about how to interpret this report.

8. If necessary, click the **Print** and **OK** button to get a hard copy of this report.
9. Click the **Close** button to close the **Adobe Acrobat** or **Excel** window.
10. Click the **Close** button to close the **Report Viewer** window.

Screaming Eagle High School 3/21/2008

2005-2006 **Class Load Averages by Term, Period and Grade - Term: F** Page 3

Pd	Sec#	Sm	Crs ID	Course Title	Tch#	Teacher Name	Room	Total Seats	Total Requests	Total Sections	AVERAGE Requests per Section Total	Male	Female	9	10	11	12	Actual Sched
1	0223	Y	0010	PE 9	722	Ward	GYM	235	221	5	44	29	15	44	0	0	0	0
1	0330	Y	0012	Weight Trng	702	Sanders	GYM	270	246	6	41	32	9	0	19	9	14	0
1	0254	Y	0014	Adapt PE	835	Wilber	GYM	50	16	2	8	4	5	2	2	0	4	0
1	0850	Y	0017	Beg Dance	630	Dye	GYM	150	129	3	43	0	43	34	3	3	3	0
1	0101	Y	0026	Dan Shw/Dis Te	802	Schuler	L1	200	17	2	9	1	8	3	4	1	1	0
1	0449	Y	0101	Art I	616	Castaneda	F8	105	103	3	34	23	12	20	10	3	1	0
1	0156	Y	0104	Ceramics I	699	Rodriguez	F6	133	113	5	23	11	11	0	1	11	10	0
1	0193	Y	0105	Ceramics II	699	Rodriguez	F6	35	12	5	2	2	1	0	0	0	2	0

In this example, you can see the mix of females to males and the spread of 9th, 10th, 11th, and 12th graders within each section.

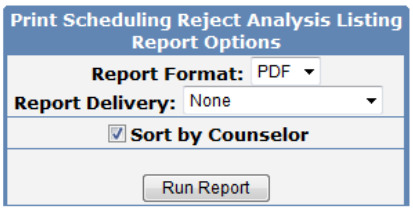
If you need to balance the ratio of males/females or grade levels, consider locking some of the sections in the Student Data > Scheduling > Course Requests / Schedule screen and then re-run the auto scheduler. You can also manually reschedule students within sections to achieve a gender/grade balance. Instructions to manually reschedule students is covered in the **Chapter 5, Section 1 – Working with the master schedule in the new database**.

To locate the students represented by the numbers above, run the **Scheduling Reverse Verification Report** covered in Chapter 2, Section 5 – Course Request Queries and Reports.

Scheduling Reject Analysis Listing report

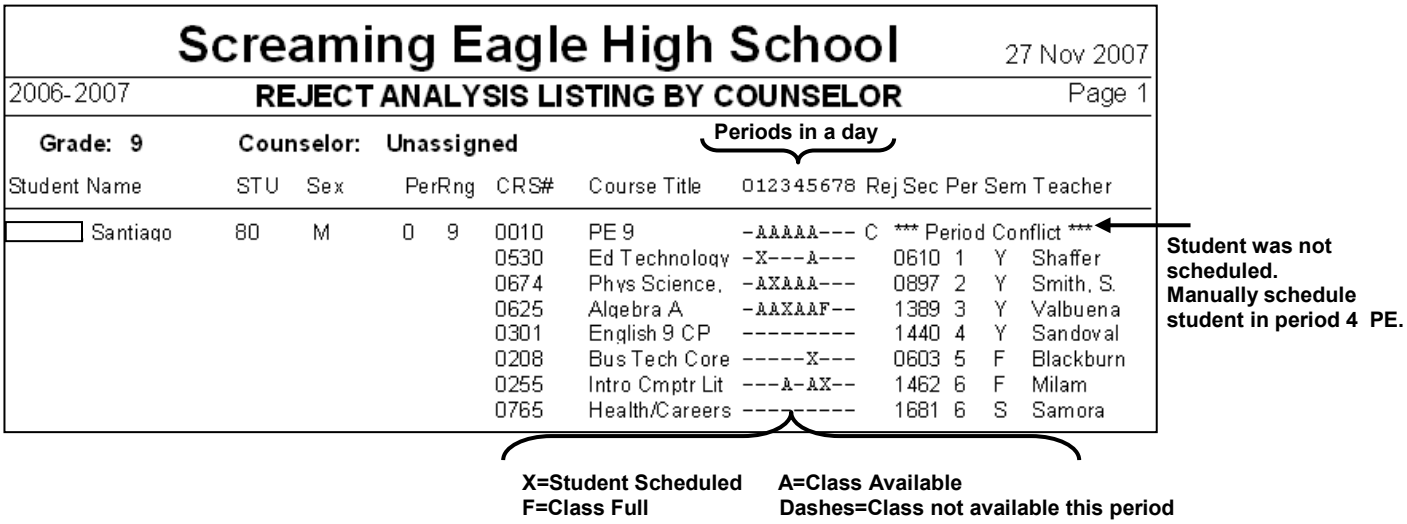
Run this report to get a list of students who did not get fully scheduled so they can meet with their counselor to work out a new schedule.

1. Select the **Scheduling Process > Scheduling Dashboard > D. Schedule Students > Scheduling Reject Analysis Listing** link.
2. In the **Report Format** field, select the desired option from the drop-down list (e.g., PDF or Excel).
3. In the **Report Delivery** field, select the desired option from the drop-down list (e.g., None or Email w/o Attachment).
4. In the **Sort by counselor?** field, click to put a check mark in the box.



5. Click the **Run Report** button.
6. Click the **Review Report** button.

   The report now appears in the Adobe Acrobat or Excel window. Refer to the sample report on the next page for information about how to interpret this report.
7. If necessary, click the **Print** and **OK** button to get a hard copy of this report.
8. Click the **Close** button to close the **Adobe Acrobat** or **Excel** window.
9. Click the **Close** button to close the **Report Viewer** window.



Screaming Eagle High School 27 Nov 2007

2006-2007 REJECT ANALYSIS LISTING BY COUNSELOR Page 1

Grade: 9 Counselor: Unassigned

Periods in a day

Student Name	STU	Sex	PerRng	CRS#	Course Title	012345678	Rej	Sec	Per	Sem	Teacher
Santiago	80	M	0 9	0010	PE 9	-AAAAA---	C	*** Period Conflict ***			
				0530	Ed Technology	-X---A---		0610	1	Y	Shaffer
				0674	Phys Science,	-AXAAA---		0897	2	Y	Smith, S.
				0625	Algebra A	-AAXAAF--		1389	3	Y	Valbuena
				0301	English 9 CP	---------		1440	4	Y	Sandoval
				0208	Bus Tech Core	-----X---		0603	5	F	Blackburn
				0255	Intro Cmptr Lit	---A-AX--		1462	6	F	Milam
				0765	Health/Careers	---------		1681	6	S	Samora

Student was not scheduled. Manually schedule student in period 4 PE.

X=Student Scheduled
F=Class Full

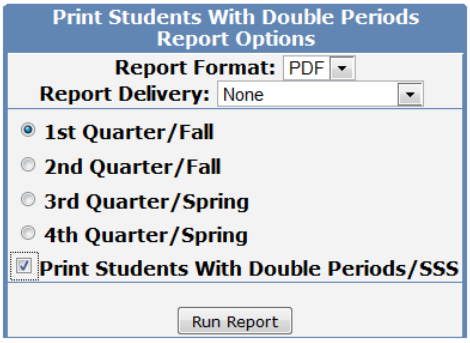
A=Class Available
Dashes=Class not available this period

In the example above, Santiago was not scheduled into PE 9 due to a period conflict. Since the rest of his classes were scheduled successfully, you would have to manually schedule him into a period 4 PE class which shows available seats.

Students with Double Periods

Run this report to get a list of students who have more than one section scheduled in the same period.

1. Select the **Scheduling Process > Scheduling Dashboard > D. Schedule Students > Students with Double Periods** link.



2. In the **Report Format** field, select the desired option from the drop-down list (e.g., PDF or Excel).
3. In the **Report Delivery** field, select the desired option from the drop-down list (e.g., None or Email w/o Attachment).
4. Select the semester whose schedules you are checking.
5. If you are still working in the **Scheduling Process > Scheduling Master or SMS Board** area, select the **Print Students With Double Periods/SSS** option.
6. Click the **Run Report** button.
7. Click the **Open** button.

   The report now appears in the Adobe Acrobat or Excel window. Refer to the sample report on the next page for information about how to interpret this report.
8. If necessary, click the **Print** and **OK** button to get a hard copy of this report.
9. Click the **Close** button to close the **Adobe Acrobat** or **Excel** window.
10. Click the **Close** button to close the **Report Viewer** window.

TEST DEL VALLEJO MIDDLE SCHOOL 7/19/2013

2013-2014 **Students with Two or More Classes in a Period** Page 1

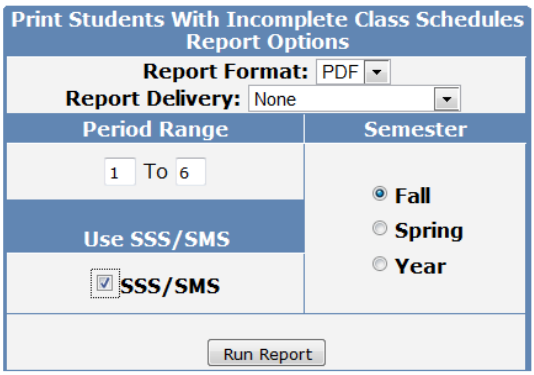
STU#	Student Name	Grade	Term	Period	Days	Course#	Course Title	Teacher	Room#
50	Stephen	8	Y	7	MTWTF-	M054	Algebra Foundations	Skaggs,James	
					MTWTF-	C031	American Hist 8	Celano,Peter	D7
278		7	Y	5	MTWTF-	E0024	Reach B2	Zapata,Lydia	E7
					MTWTF-	S022	Life Science 7	Pham,Jennifer	C10

In this example, student 50 has an Algebra Foundations and American History class scheduled in 7th period.

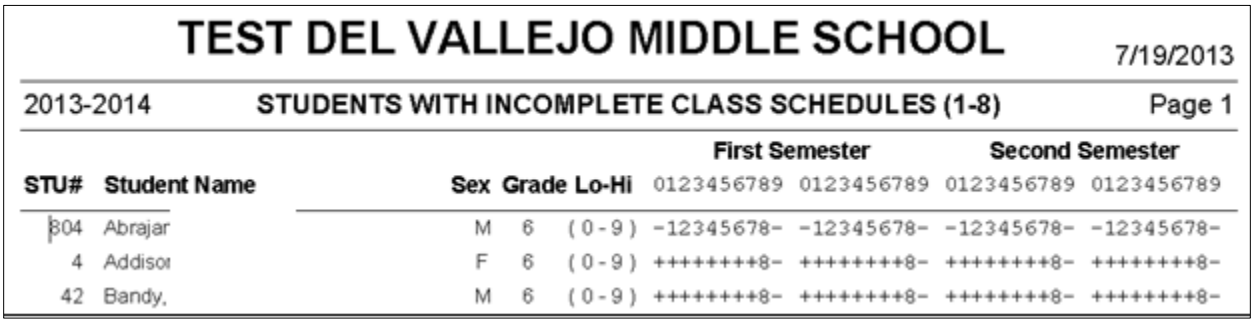
Students with Incomplete Class Schedules

Run this report to get a list of students who have incomplete class schedules.

1. Select the **Scheduling Process > Scheduling Dashboard > D. Schedule Students > Students with Incomplete Class Schedules** report.



2. In the **Report Format** field, select the desired option from the drop-down list (e.g., PDF or Excel).
3. In the **Report Delivery** field, select the desired option from the drop-down list (e.g., None or Email w/o Attachment).
4. In the **Period Range** area, enter the periods your school will be using (e.g., 1 to 6 for high school and 1 to 7 for middle school).
5. Select the **Semester**.
6. If you are still working in the **Scheduling Process > Scheduling Master or SMS Board** area, select the **SSS/SMS** option.
7. Click the **Run Report** button.
8. Click the **Open** button. The report now appears in the Adobe Acrobat or Excel window.



TEST DEL VALLEJO MIDDLE SCHOOL 7/19/2013

2013-2014 STUDENTS WITH INCOMPLETE CLASS SCHEDULES (1-8) Page 1

STU#	Student Name	Sex	Grade	Lo-Hi	First Semester 0123456789	First Semester 0123456789	Second Semester 0123456789	Second Semester 0123456789
804	Abrajar	M	6	(0-9)	-12345678-	-12345678-	-12345678-	-12345678-
4	Addiso	F	6	(0-9)	++++++++8-	++++++++8-	++++++++8-	++++++++8-
42	Bandy,	M	6	(0-9)	++++++++8-	++++++++8-	++++++++8-	++++++++8-

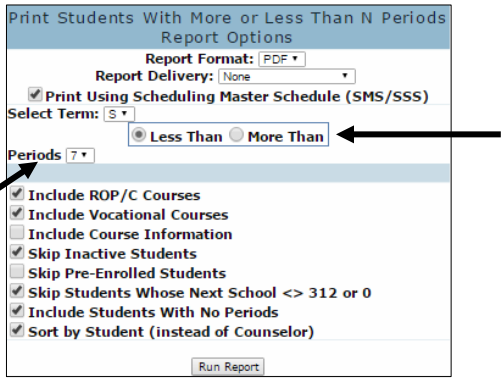
In this example, for a school with an 8 period day, student 804 has no sections scheduled and student 4 is missing an 8th period section.

9. If necessary, click the **Print** and **OK** button to get a hard copy of this report.
10. Click the **Close** button to close the **Adobe Acrobat** or **Excel** window.
11. Click the **Close** button to close the **Report Viewer** window.

Students With More or Less Than N Periods

Use this report to identify students who do not have all their periods.

1. Click on the **Scheduling Process > Scheduling Dashboard > D. Schedule Students** > **Students with More or Less Than N Periods.**
2. Select the desired **Report Format** and **Report Delivery** options.
3. You can use **Print Scheduling Master Schedule (SMS/SSS)**.
4. Select **Term**.
5. To look for students who are **missing periods**, click in **Less Than,** and then enter a value one digit *lower* than what you are looking for in the **Periods** box. (i.e., enter 6 if you are looking for students with 5 or fewer courses).
6. To look for students with **too many periods**, check **More Than** and enter a value one digit *higher* than what you are looking for in the **Periods** box (i.e., enter 6 if you are looking for students with 7 or more courses).
7. Select the **options** you wish.
8. Click the **Run Report** button.
9. Click on the **View Report** button.
10. To print the report, click the **Print** button and then click **OK**.



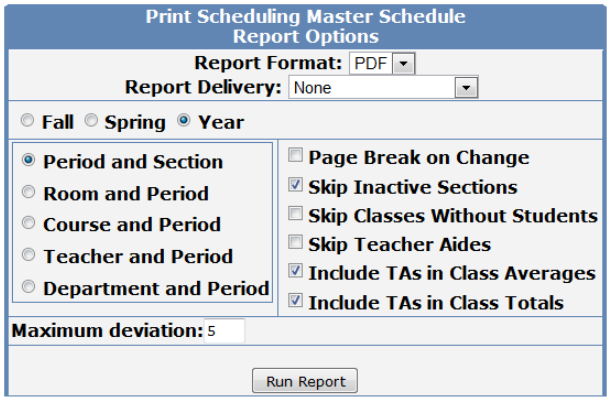
2016-2017 **Students with More Than 7 Periods**

STU#	Student Name	Grade	Sex	Program	Student's Periods
1171	Aday	7	M		-12345678-
793	Bell,	8	F		-12345678-
1048	Cruz,	7	M		-12345678-
782	Gonz	8	M		-12345678-

Scheduling Master Schedule

Run this report to get a birds-eye view of the entire Scheduling Master so you can look for potential errors.

1. Select **Scheduling Process > Reports** link on the Navigation Tree. A list of scheduling reports appears.
2. Click on the **Scheduling Master Schedule** report. The report options screen appears



3. In the **Report Format** field, select the desired option from the drop-down list (e.g., PDF or Excel).
4. In the **Report Delivery** field, select the desired option from the drop-down list (e.g., None or Email w/o Attachment).
5. Select the semester whose schedules you are checking (e.g., Fall (HS), Spring (HS), or Year (MS)).
6. Select additional options to instruct Aeries on how you want the report sorted and where to place the page breaks.
7. Click the **Run Report** button.
8. At the **File Download** dialog box, click the **Open** button. The report now appears in the Adobe Acrobat or Excel window. Refer to the sample report on the next page for information about how to interpret this report.

TEST GOLDEN VALLEY MIDDLE SCHOOL 10/25/2013 9:38 AM

2013-2014 **SCHEDULING MASTER SCHEDULE BY PERIOD and SECTION** Page 1

Sec#	Pd-Bl	Sm	Days	Crs ID	Course Title	Dept	Tch#	Teacher Name	Room	Credit	Sex	Low	High	Max	Tot	Boys/Pct		Girls/Pct		Pre	Sm Grp	Sch Grp	Crs Grp	Team Num	T/A
1000	1	Y	MTWTF	M021	Math 7	M	14	Barthelemy,Don	A1	5.0		6	6	36	25	12	48	13	52	0					
1001	1	Y	MTWTF	C021	World History 7	C	65	Murillo,Joseph	A2	5.0		6	6	36	31	16	52	15	48	0					
1002	1	Y	MTWTF	E041	ELA Core 7	E	137	Wheeler,Laura	A3	5.0		6	6	36	17	6	35	11	65	0					
1003	1	Y	MTWTF	E047	ELA Core 7L	E	137	Wheeler,Laura	A3	5.0		6	6	36	6	4	67	2	33	0					
1004	1	Y	MTWTF	S022	Life Science 7	S	104	Onyegbaduo,Chi	A4	5.0		6	6	36	26	14	54	12	46	0					
1005	1	Y	MTWTF	E062	ELA Core 8G	E	36	Lackie,Laura	C2	5.0		8	8	36	27	14	52	13	48	0					
1006	1	Y	MTWTF	E067	ELA Core 8L	E	36	Lackie,Laura	C2	5.0		8	8	36	0	0	0	0	0	0					
1007	1	Y	MTWTF	C031	American Hist 8	C	131	Romero,Jesse	C3	5.0		8	8	36	28	13	46	15	54	0					

9. If necessary, click the **Print** and **OK** button to get a hard copy of this report.
10. Click the **Close** button to close the **Adobe Acrobat** or **Excel** window.
11. Click the **Close** button to close the **Report Viewer** window.

Section 3 – Solve Balance, Conflict, and Reject issues

You will continue to repeat the steps in Chapter 2, 3, and 4 until your Scheduling Master is as clean as it can be and then stop tweaking it! You will never get it 100% accurate so decide when it is as good as it can get and then make the final adjustments manually.

Suggested ways to solve scheduling issues

- Use the Scheduling Class Load Analysis, Class Load Averages, Reject Analysis Listing, Students With Incomplete Class Schedules, and Students With Double Periods reports from Section 2 of this chapter to help you identify where you need go to adjust your Scheduling Master.
- Run the **Students With Duplicate Course Requests report** to identify students with duplicate course IDs in their schedule.
- If the student has a conflict issue, consider moving a section to another period.
- If the filled seats are not in balance, consider moving a section to another period.
- If students have been rejected, consider rescheduling them into another section (required class) or have student choose another section (elective).

Section 4 – Copy SMS and SSS Tables onto the MST and SEC Tables

Once you are done tweaking your schedule, the Scheduling Master tables (SMS and SSS) are now ready to be copied over to the current year's Master Schedule tables (MST and SEC). This step should be done after the current school year ends, several days or a week before the new school year starts.

Contact Information Technology at (909) 386-2550 and ask them to copy your Scheduling Master schedule into your next year's Master Schedule.

The Auto Scheduler is not available after you have copied your Scheduling Master into the Master Schedule.

Aeries Scheduling Tables

SSS	Student Scheduling System (course requests for next year)
SMS	Scheduling Master Schedule (next year's master schedule)
MST	Master Schedule (current year)
SEC	Student Schedules (current year)

Chapter 5 - Finishing Touches

Topics covered in this chapter:

Section 1: When data is in Master Scheduling screen

--Scheduling using a Course Request Packet

--Manually Entering, Deleting and Changing Sections for one student

Section 2: Reports

--Print student schedules (locator cards)

--Print Class List by Section

Section 1 – When data is in the Master Schedule Screen

In the previous chapter, you were instructed to ask Information Technology to copy your Scheduling Master Schedule over to your Master Schedule (MST).
You are now ready to work in your current year's Master Schedule. You will no longer have access to your Scheduling Master Schedule (SMS).
*You will see the message, "**Scheduling tables have been disabled**" when you navigate to the Scheduling Master screen.*

You will now manually enter individual student schedules using the:

- Course Request Packets
- OR Entering one Section at a time in the **Classes** screen.

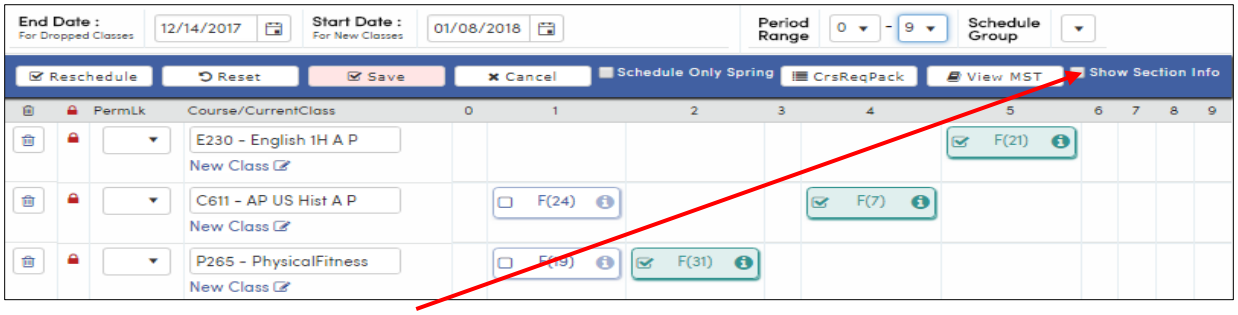
Using a Course Request Packet (Master Schedule)

Use these steps if your scheduling data is sitting in your Master Schedule and you want to add the desired courses via a Course Request Packet, and then you can select the sections that are shown as available.

> ☝ You will need to create **Course Request Packets** before you begin using the steps in the section. For instructions on how to create these packets, refer to the Appendix.

1. Click on the **Pages** icon in the left Navigation Pane.
2. Type the word **Classes** in the Filter Pages….field.
3. Select **Classes** from the listing.
4. Make sure you are on the **correct student**.
5. Click the **Edit** button.
6. Click on the CrsReqPack button.
7. Select the desired **packet**.
8. Click the **Add Packet(s)** button.

   The newly added courses will appear on the students Classes screen.
   To view **information** for the section click on the icon or you can click the **Show Section Info** box.



9. Place a **check mark** in the Section you want to place the student into.
10. Click the Save button.

Entering, Deleting and Changing Sections for One Student (MST)

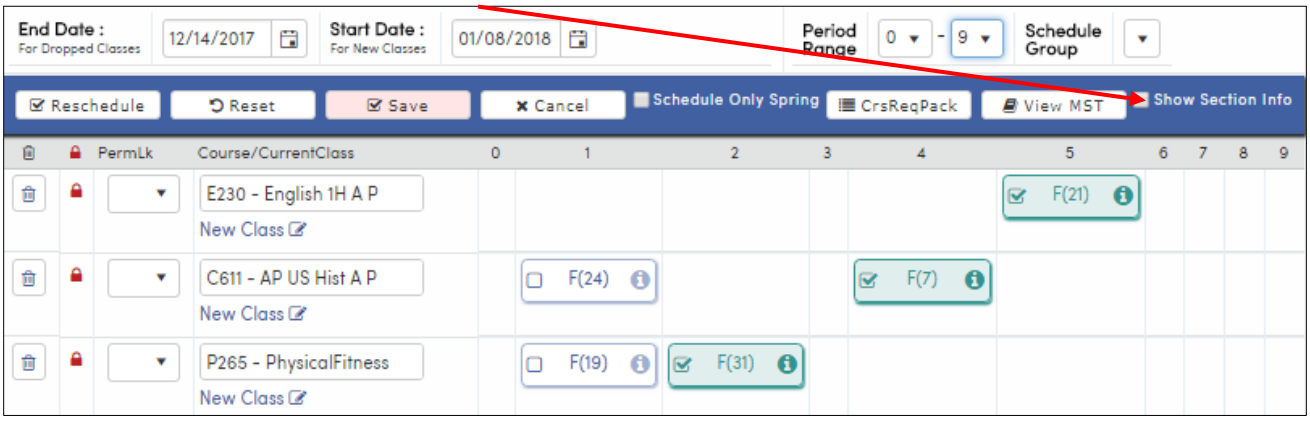
Use these steps to manually enter, delete and change a student's Schedule in your Master Schedule.

1. Select the desired **student**.
2. Click on the **Pages** icon.
3. Type **Class** into the Filter Pages field.
4. Select **Classes** from the listing.
5. Click on the Edit button.
6. The **Start Date** must be the day the student will attend class.
   The **End Date** applies if you are dropping classes.
7. The **Period Range**: Select what applies from 0 – 9.
8. The **Schedule Group**: Make sure it is correct for this student.

If you need the Master Schedule Listing (MSL), click on the View MST button.

9. To Add a Section/Class, use the New Class button (bottom of screen) and enter the Section # or click on the **ADD** next to the Section on the MSL.
10. To Add a **Course/CurrentClass**, type the Course # (make sure to use a capitol letter) and then select the **Section**.
11. Click the Save button.

Check the box for **Show Section Info** to see section information or use the icon on each section.



12. Changes and Deletions (trash can=dropped) are made from this same screen. Make sure to use the **End Date** for drops. Use the **Crs (Course) Attendance** screen to see your changes.

> ☝ If the Auto Scheduler has already run, the Section # field(s) will display a value. If it has not run, the Section # field(s) will be blank.

Section 2 – Print Student Schedules

When your master schedule is complete, print student schedules so that you can hand them out during registration.

1. Click on the **Reports** icon on the Navigation Tree.
2. Click in the **Filter Reports…** field and type: **locator.**
3. Select **Student Locator Cards**.
4. In the **Report Format:** field, verify that **PDF** is the selected option.
5. In the **Report Delivery** field, select the desired option (e.g., Email w/attachment, Email w/o attachment, or none).
6. On the **Style of Locator Cards** tab, select the options listed below:

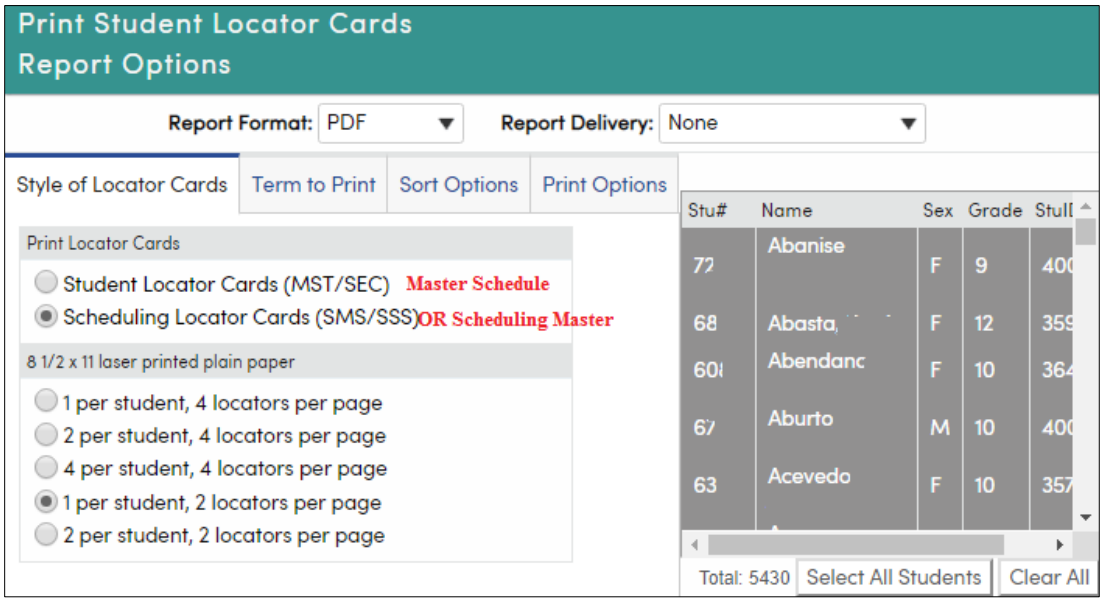
   In the **Print Locator Cards** area, select the option that *aligns with where your scheduling data currently sits:*

   a. Your scheduling data is sitting in the **Master Schedule** screen, select **Student Locator Cards (MST/SEC**).

   b. You finished your schedules while still in your **Scheduling Master**, you then use the (SMS/SSS) option.

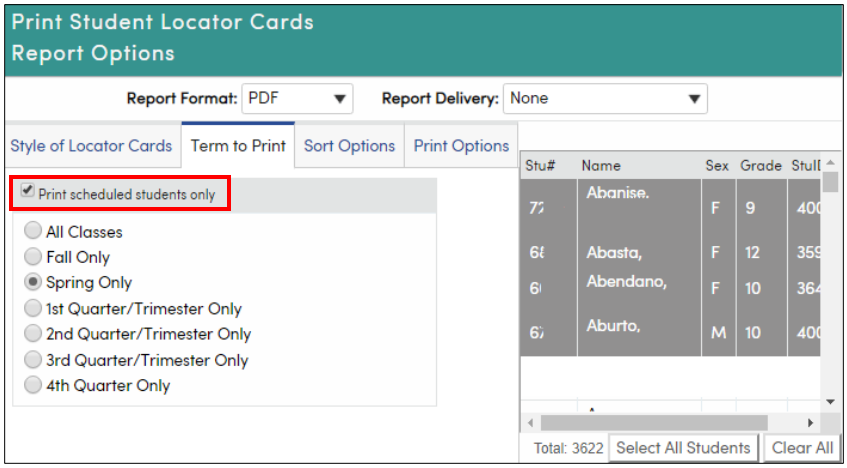
7. In the **8 ½ x 11 laser printed plain paper** area, select the desired option (i.e., how many schedules you want to print on one sheet of paper).

   a. Recommended: 1 per student, 2 locators per page (as shown).

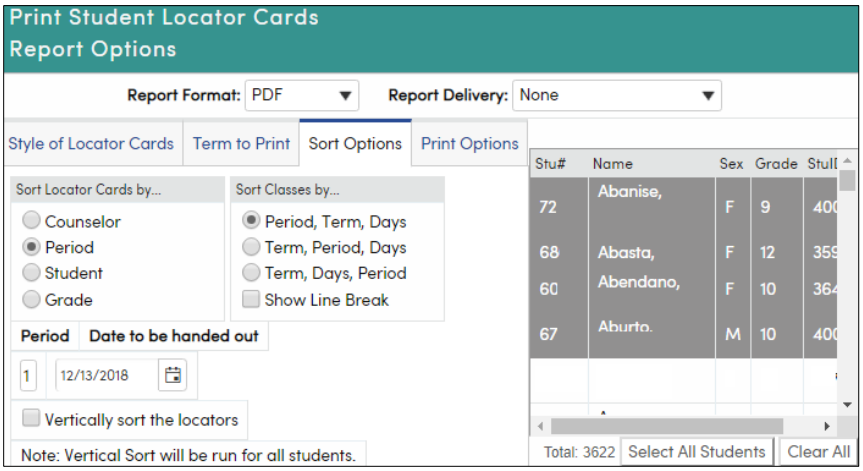


8. Click the **Select All Students** button at the bottom of the list of students (you may want to run a KEEP statement to limit this to a grade, e.g., KEEP STU IF GR = 10).
   A value appears to the right of the **Total**: field and all names highlight when done. To omit one or more students, click the student's name and the highlighting disappears. To deselect all students, click the **Clear All** button.

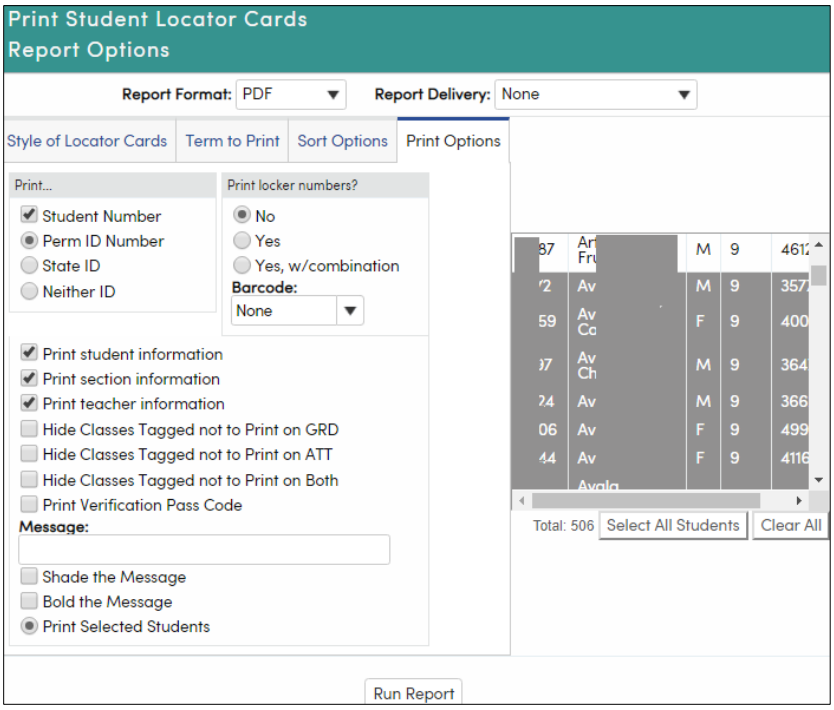
9. Click on the **Term to Print** tab:
    a. In the **Print scheduled students only** option, make sure it is checked.
    b. Select the desired **quarter/semester** to print.



10. On the **Sort Options** tab:
    a. **Sort Locator Cards by…** column, select the desired options.
    b. **Sort Classes by…** column, select the desired options
        i. Recommended: Period, Period, Term, Days.
            1. If using SMS, make sure to use a date the students were in school.
            I.e., For Spring Term, you would use the last date the students were in school before Winter Break. This will ensure you get the period teacher name in the bottom right corner of the student's schedule.

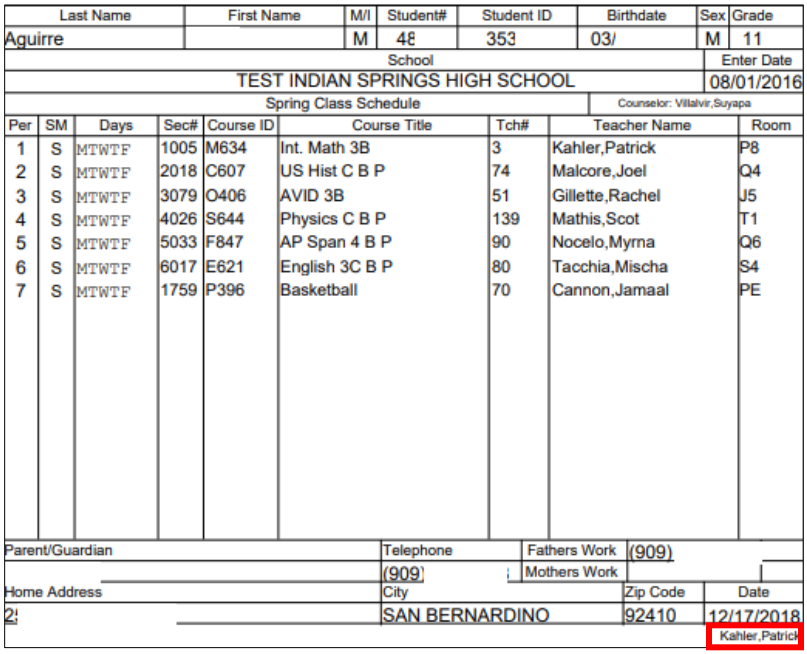


11. On the **Print Options** tab:
    a. **Print…**area, select the desired option.
    b. **Print locker numbers?** area, **No** is selected.
    c. Leave the following options checked:
       Print student information
       Print section information
       Print teacher information
12. **Message** field, if your site chooses to add a message, enter the message here.
    Select additional options as desired (e.g., Shade the Message or Bold the Message).



13. Click **Run Report**.
14. **View Report**. Before printing you can decide if you want to go back and make any changes to this layout using the instructions above.

    NOTE: if you used the Period option (#10), the period teacher name will be in the lower right corner.



Last Name	First Name	M/I	Student#	Student ID	Birthdate	Sex	Grade
Aguirre		M	48	353	03/	M	11

School	Enter Date
TEST INDIAN SPRINGS HIGH SCHOOL	08/01/2016

Spring Class Schedule — Counselor: Villalvir,Suyapa

Per	SM	Days	Sec#	Course ID	Course Title	Tch#	Teacher Name	Room
1	S	MTWTF	1005	M634	Int. Math 3B	3	Kahler,Patrick	P8
2	S	MTWTF	2018	C607	US Hist C B P	74	Malcore,Joel	Q4
3	S	MTWTF	3079	O406	AVID 3B	51	Gillette,Rachel	J5
4	S	MTWTF	4026	S644	Physics C B P	139	Mathis,Scot	T1
5	S	MTWTF	5033	F847	AP Span 4 B P	90	Nocelo,Myrna	Q6
6	S	MTWTF	6017	E621	English 3C B P	80	Tacchia,Mischa	S4
7	S	MTWTF	1759	P396	Basketball	70	Cannon,Jamaal	PE

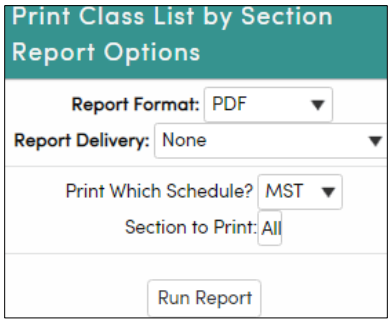
Parent/Guardian	Telephone	Fathers Work	(909)
	(909)	Mothers Work	
Home Address	City	Zip Code	Date
2	SAN BERNARDINO	92410	12/17/2018

Kahler,Patrick

Section 3 – Print Class List by Section Report

When your master schedule is complete, you may want to print class schedules for teachers so that they can review their students for the coming year.

1. Click on the **Reports** icon and type **class list** in the Filter Reports…. field.
2. Click on the **Class List by Section** report.
   The Print Class List by Section report options screen appears.
3. In the **Report Format:** field, select **PDF**.
4. In the **Report Delivery:** field, select the desired option (e.g., Email w/attachment, Email w/o attachment, or none).
5. At the **Print Which Schedule** field, select **MST**.
6. At the Section to Print field, select the desired period or select **All** if you want to print all periods.
7. Click the **Run Report** button.
8. Click **View Report.**
9. Click the **Open** button. The following report appears.



TEST INDIAN SPRINGS HIGH SCHOOL 11/29/2018

2018-2019 **Class List by Section** Page 1

Sec# 0111 Pd: 1 Sem: F Crs: English 1C A P Tch: Alba,Luis Rm: H5

STU#	Student Name	Grade	Sex	STU#	Student Name	Grade	Sex
007	Acosta	9	F				
007	Acua-F	9	F				
008	Alvarez	9	F				
008	Anzuet	9	M				

Chapter 6 - Appendix

Topics covered in this chapter:

--Creating a Course Request Packet

--Modifying the Scheduling Letter to Parents

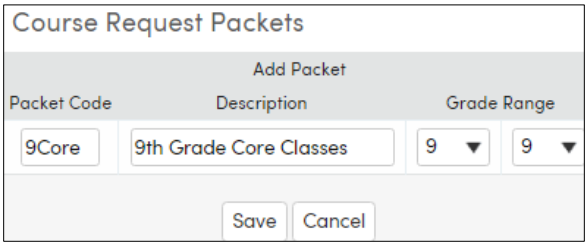
--How to use the SchdGrp, TmCrsGp, and Team# fields when auto scheduling students

Creating a Course Request Packet

Creating a course request packet groups together courses and greatly reduces the amount of time it takes to enter course requests into Aeries. E.g., create group for Gate, 6th grade, 7th grade.

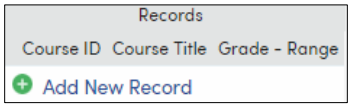
> You will need the Master Scheduling security role in Aeries to be able to complete these steps. To request this role, have your administrator contact the Information Technology Security Specialist for assistance. securityspecialist@sbcusd.com or call (909) 386-2550.

1. Click on the **Pages** icon, and then type **course request** in the Filter Pages…..field.
2. Select **Course Request Packets**.
3. Click on the **Add Packet** button (bottom of screen).
4. In the **Packet Code** field, enter a code to represent the name of this packet. You have up to 6 characters and/or numbers.
5. In the **Description** field, enter a descriptive name for this packet.
6. In the **Grade Range** field, enter the appropriate grade range of this packet.

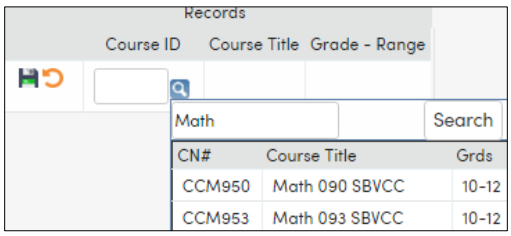


7. Click the **Save** button to save your changes.

   Verify that your **new packet** is selected.



8. Click the **Add New Record** link.
9. In the **Course ID** field, enter the desired Course ID.
   OR
   Click the icon and enter a course name, and then click the **Search** button.
   Courses that match your criteria display directly below the Search field.



10. **Select** the course in the results area.
11. Click on the icon to **SAVE**.
    The course is now entered in the Course Request Packet.
    Continue with all the Courses for this packet.

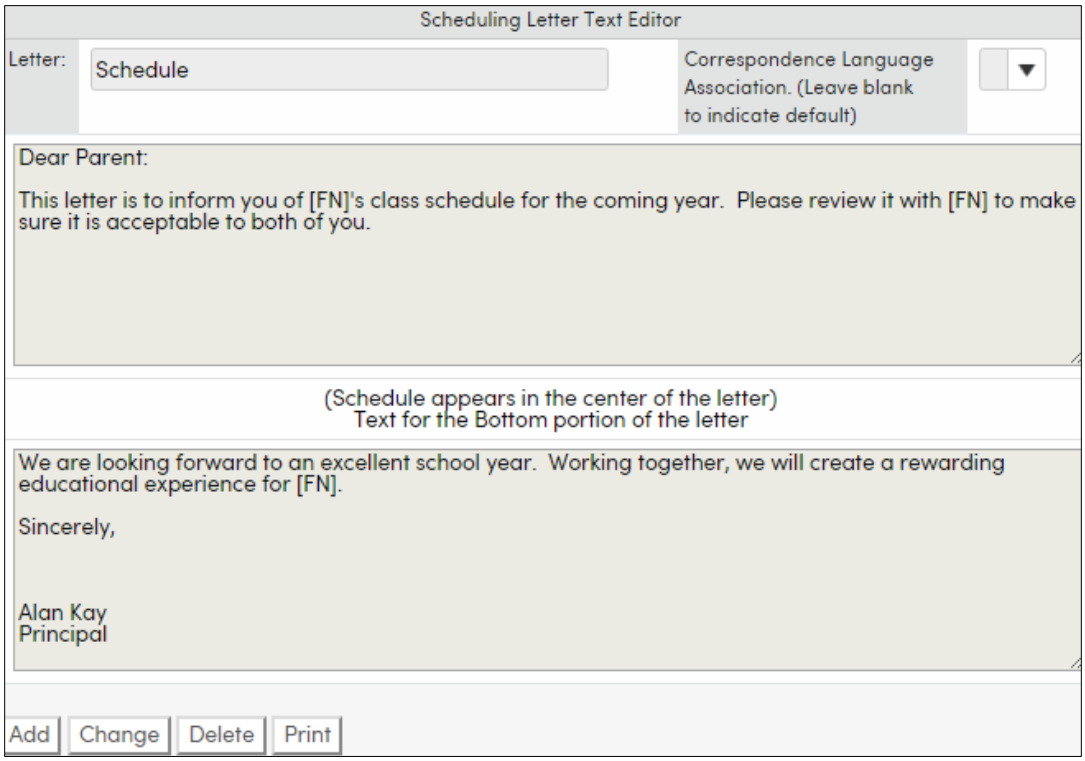
> **Edit the Packet(s)** using the Edit, Add, and Delete buttons at the bottom of the screen.

Modifying the Course Request Letter to Parents

Follow these steps to edit the Course Request Letter you can use to send to parents letting them know what Courses their student has signed up to take.

1. Click on the **Pages** icon and type **scheduling letter** in the Filter Reports…field.
2. Select **Scheduling Letter Text Editor**.

Default Letter Text



Print the Scheduling Letter to Parent

1. Click on the **Reports** icon, and then type **scheduling letter** in the Filter Reports… field.
2. Select the **Scheduling Letter to Parent**.
3. Select your **options**.
4. **Run Report**.

TEST INDIAN SPRINGS HIGH
650 North Del Rosa Dr
San Bernardino, CA 92410

November 29, 2018

Michael
Re: Precious
E 3rd St #L8
San Bernardino, CA 92410

Dear Parent:

This letter is to inform you of Precious class schedule for the coming year. Please review it with Precious to make sure it is acceptable to both of you.

Per	Sem	Sec#	Days	CrsID	Course Title	Teacher Name	Room
1	F	158	MTWTF	U301	ChoirCncrt 1A P	Kay,Gregg	D1
1	S	1041	MTWTF	U302	ChoirCncrt 1B P	Kay,Gregg	D1
2	F	211	MTWTF	E220	English 1C A P	Alba,Luis	H5
2	S	2010	MTWTF	E221	English 1C B P	Alba,Luis	H5
3	F	330	MTWTF	S261	Biology 1C A P	Gonzales,Jimmy Re	K1
3	S	3026	MTWTF	S262	Biology 1C B P	Gonzales,Jimmy Re	K1
4	F	423	MTWTF	C334	W Geog C A P	McMillon II,Edward	J1
4	S	4018	MTWTF	C335	W Geog C B P	McMillon II,Edward	J1
5	F	580	MTWTF	P201	PE Survey 1A	Sein,Randi	PE
5	S	5061	MTWTF	P202	PE Survey 1B	Sein,Randi	PE
6	F	662	MTWTF	O119	Leaders of the PACC A	Hawkins,Luquanda	H8
6	S	6053	MTWTF	O120	Leaders of the PACC B	Hawkins,Luquanda	H8
7	F	707	MTWTF	M233	Int. Math 1A	Salazar,Cynthia	H10
7	S	7007	MTWTF	M234	Int Math 1B	Salazar,Cynthia	H10

We are looking forward to an excellent school year. Working together, we will create a rewarding educational experience for Precious

Sincerely,
Alan Kay
Principal

How to use the SchdGrp, TmCrsGp, and Team# fields when auto scheduling students

Overview of Scheduling Groups (SchdGrp)

If you want to **group students together** so that they get scheduled into specific sections, then use the SchdGrp field in both the Student Data > Demographics and the Scheduling Process > Scheduling Master screens. When the auto scheduler runs, students with the same SchdGrp code will be placed in a section with the same code or a section with no SchdGrp code.

> For more detailed information about how to use Scheduling Groups, Team Course Group, and Team #, click on the Help button (top right corner of the Aeries home screen). Type **scheduling groups and teams** into the seach field. Read both of the **Complex Schedules** links to understand how they work and what they do. Good website:
> http://www.aeries.com/training-support/support-videos to **SUPPORT VIDEOS** to **Scheduling**.
>
> This is a great query you can run to see your Teams and Scheduling Groups:
> LIST STU SSS SMS CRS TCH STU.ID STU.NM STU.SX STU.GR SMS.PD SMS.SE SMS.CN CRS.CO TCH.TE SMS.RM SMS.SG SMS.CG SMS.TM BY STU.NM STU.ID SMS.PD

Information Technology can assist users by automatically populating the SchdGrp fields, using criteria selected by the site, with a code of their choosing.

Have Information Technology clear all incoming students' SchGrp codes so you start fresh each year. SchdGrps that will stay the same for one or more years, can be left alone (let Information Technology know which students are to remain the same as the previous year).

Let the Registrar know to add a Sched Grp code to all new enrollees so it is in place for next year.

Run your **Master Schedule Report** by Period and Section to see any Scheduling Groups already created and you can use the query above.

2018-2019 **MASTER SCHEDULE BY PERIOD and SECTION**

Sec#	Pd-Bl	Sm	Days	Crs ID	Course Title	Dpt	TN	Teacher Name	Room	CR	SX	LO	HI	MX	Tot	Boys/Pct	Girls/Pct	Sch Grp	Crs Grp	Tm Nm	Sm Grp
118	1	F	MTWTF	E220	English 1C A P	E	102	Sing,Brenda	H4	5.0	9	9	31	29	20	69.0	9 31.0	A	R		
119	1	F	MTWTF	E620	English 3C A P	E	80	Tacchia,Mischa	S4	5.0	11	11	31	28	13	46.4	15 53.6	A	R		
120	1	F	MTWTF	E620	English 3C A P	E	48	Jinks,Erik	H11	5.0	11	11	31	27	15	55.6	12 44.4	A	R		

Overview of Team Course Group and Team Number (TmCrsGp and Team#)

If you want to **group sections together** so that when a student is scheduled in one of the sections in the group he/she will also be schedule into sections of the same group, then use the TmCrsGp and Team# fields in the Scheduling Process > Scheduling Master screen. This is the preferred method since you do not have to edit every student's demographics page (as in Scheduling Groups above).

On the following pages, a few scheduling scenarios are featured that will assist you in determining if one of these scheduling fields will work for you.

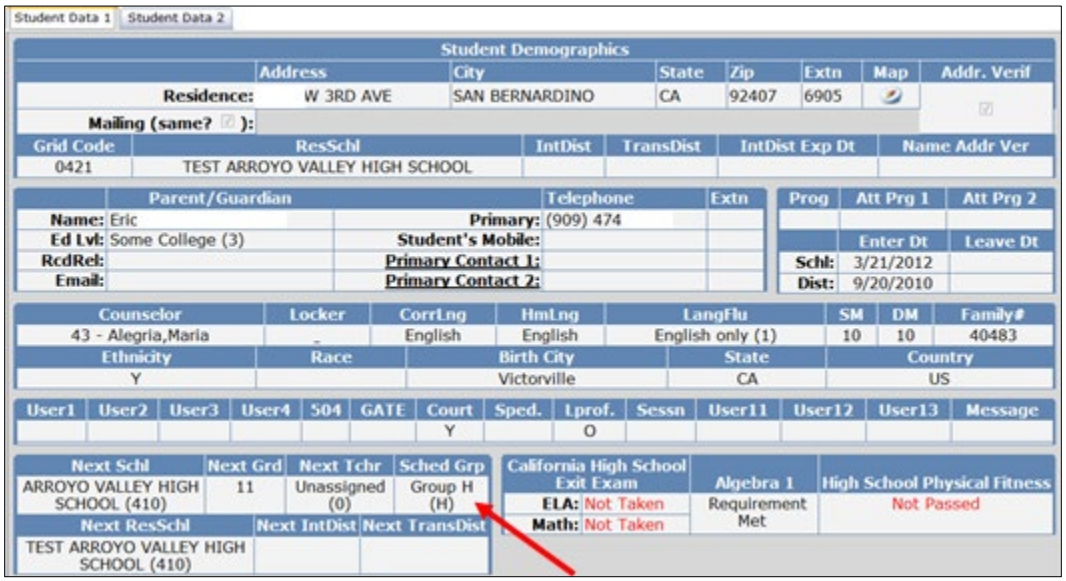
If you do not see your specific scheduling scenario mentioned on the following pages, feel free to contact Information Technology at (909) 386-2550 to ask for assistance.

Scheduling Scenarios

In this section we feature scheduling scenarios that will assist you in matching students with the correct sections. This is used for "auto scheduling" students within the Scheduling Master or SMS Board screens.

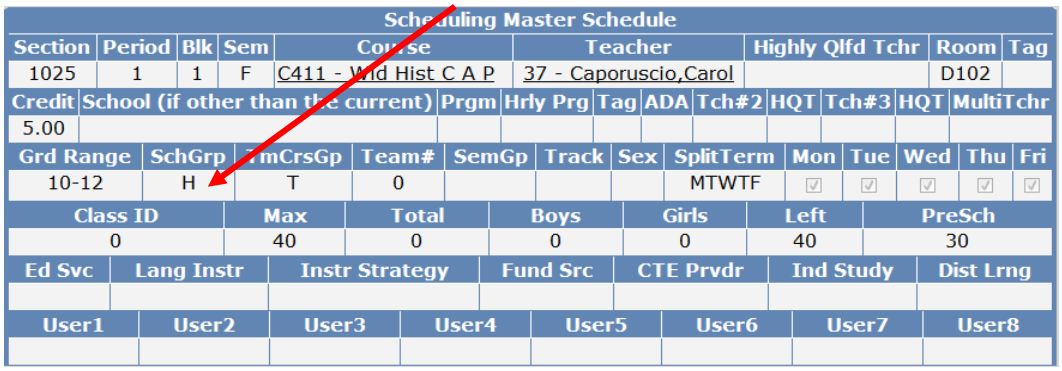
Grouping Students Together

If you group your student body together by houses, academies, teams, etc. for the purpose of scheduling these students in similar sections, enter a code in the **SchedGrp** field within the Student Data > Demographics screen.



In this example, we want to group together all students who want to pursue a career in Health Care.

To force Aeries to auto schedule this group of students into specific sections, enter the same code into the **SchGrp** field in the Scheduling Master screen for each section associated with this group.



Pros
This method is easy to understand.
The auto scheduler knows exactly what to do.
There are no other "tricks" you have to know about to make this work.

Cons
A lot of manual labor is required to enter these codes into all students' demographics screen.
You have to manually update this code if it changes year to year.
The registrar has to remember to add this code to all new enrollees.
Blank groups can also be assigned to anyone with a SchGrp.

Grouping Sections Together

If you want to group sections together so that when a student is auto scheduled into one section (e.g., English), they get auto scheduled into a specific group of matching sections (e.g., Math, Science, Social Studies), then use the Team Course Group (TmCrsGp) and Team # fields in the Scheduling Master screen.

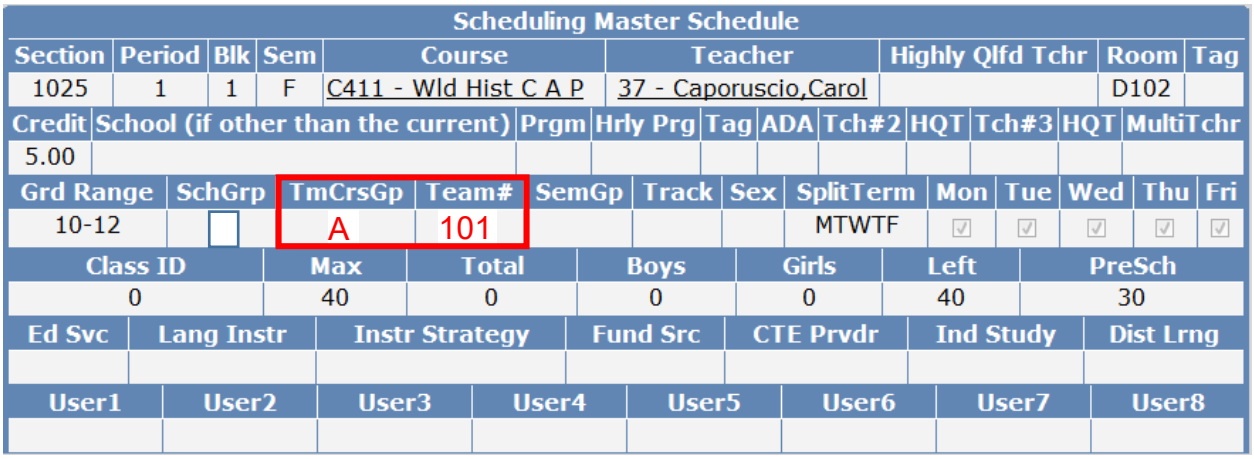
In this scenario, every group of sections that belong together should have the same TmCrsGrp and Team# code. In the example below, the TmCrsGrp and Team# codes are the same for the group of sections that you want a student to receive. Notice that each section is placed in a different period to avoid scheduling conflicts.

In the table below (gray shaded row), if a 7th grader is scheduled into Life Science Per 1, then they will also get auto scheduled into World History Per 2, PE Per 3, Math Per 4, and English Per 5 because they all share the same TmCrsGp and Team # codes (A701).

TmCrsGr A = 7th graders (core classes) *TmCrsGr B = 8th graders (core classes)*
Team# 701, 702, 703 = 7th graders *Team# 801, 802, 803 = 8th graders*

Period 1	TmCrsGp/Tm#		Period 2	TmCrsGp/Tm #		Period 3	TmCrsGp/Tm#		Period 4	TmCrsGp/Tm#		Period 5	TmCrsGp/Tm#	
S022 (LifeSci)	A	701	C021 (WrdHist)	A	701	P007 (PE)	A	701	M021 (Math)	A	701	E041 (Eng)	A	701
E041 (Eng)	A	702	S022 (LifeSci)	A	702	C021 (WldHist)	A	702	P007 (PE)	A	702	M021 (Math)	A	702
M021 (Math	A	703	E041 (Eng)	A	703	S022 (LifeSci)	A	703	C021 (WldHist	A	703	P007 (PE)	A	703
M033 (Alg)	B	801	E061 (Eng)	B	801	S032 (Phy Sci)	B	801	C031 (AmHist)	B	801	P008 (PE)	B	801
P008 (PE)	B	802	M033 (Alg)	B	802	E061 (Eng)	B	802	S032 (Phy Sci)	B	802	C031 (AmHist)	B	802
C031 (AmHist)	B	803	P008 (PE)	B	803	M033 (Alg)	B	803	E061 (Eng)	B	803	S032 (Phy Sci)	B	803

If you use TmCrsGp **A** for a Course ID (e.g., S022), then all Course IDs of the same name (e.g., S022) must use TmCrsGp **A**. In the example above, you also used an **A** for Course ID P007, so you must use **A** TmCrsGp for all P007 sections you create.



Grouping Students and Sections Together

If you have a group of students that you want scheduled within a specific group of sections, then use all three scheduling group fields (e.g., Schd Grp, TmCrsGp, and Team#). This will not only keep a specific group of students together (e.g., Band members or Health Career students), but it will also auto schedule them in a specific series of classes (e.g., Math, English, Science, Social Studies, PE).

Scheduling Master Schedule

Section	Period	Blk	Sem	Course	Teacher	Highly Qlfd Tchr	Room	Tag
1025	1	1	F	C411 - Wld Hist C A P	37 - Caporuscio,Carol		D102	

Credit	School (if other than the current)	Prgm	Hrly Prg	Tag	ADA	Tch#2	HQT	Tch#3	HQT	MultiTchr
5.00										

Grd Range	SchGrp	TmCrsGp	Team#	SemGp	Track	Sex	SplitTerm	Mon	Tue	Wed	Thu	Fri
10-12	H	A	101				MTWTF	☑	☑	☑	☑	☑

Class ID	Max	Total	Boys	Girls	Left	PreSch
0	40	0	0	0	40	30

Ed Svc	Lang Instr	Instr Strategy	Fund Src	CTE Prvdr	Ind Study	Dist Lrng

User1	User2	User3	User4	User5	User6	User7	User8

Be sure to run this query to show students with their sections, Teams and Groups:
LIST STU SSS SMS CRS TCH STU.ID STU.NM STU.SX STU.GR SMS.PD SMS.SE SMS.CN CRS.CO TCH.TE SMS.RM SMS.SG SMS.CG SMS.TM BY STU.NM STU.ID SMS.PD