

# **Scheduling Guide**

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Chancery SMS<sup>®</sup>

**PEARSON**



**Released April 2008**

This edition applies to Release 6.6.5 of the Chancery SMS software product and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

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# Contents

- About Chancery SMS ..... 1**
  - Support Services Available ..... 1
  - Documentation Included ..... 1
  - Getting Training ..... 3
  - Getting Support..... 4
  
- Scheduling Overview ..... 5**
  - Understanding Chancery SMS Scheduling Options  
(for Win School and Mac School Users) ..... 5
  - Differences Between Elementary and Secondary Scheduling Methods..... 6
  - Selecting the Scheduling Method..... 7
  - Defining Contiguous Periods ..... 8
  - Switching to the School Planning Calendar ..... 9
  - Working With Student Records ..... 10
  
- Data Mapping Constraints for Scheduling ..... 13**
  
- Section 1: Elementary Scheduling ..... 15**
  - Scheduling in Planning and Active Calendars ..... 15
  - Updating Statistics ..... 16
  - Elementary Scheduling Overview ..... 16
  - Permission to Work with Elementary School Scheduling ..... 17
  - Understanding Chancery SMS Elementary School Scheduling Terminology ..... 19
  - Using the Planning Schedule to Schedule the Next School Year ..... 21
    - Creating Planning Schedules ..... 21
  
- Setting Up Basic Scheduling Elements ..... 23**
  - Checking Staff Lists ..... 23
    - Adding Teachers ..... 23
  - Setting Up Rooms ..... 24
  - Reviewing the Subject Framework..... 25
  
- Setting Up the Scheduling Structure ..... 27**
  - Defining Scheduling Groups ..... 27
    - Editing Scheduling Group Defaults ..... 28
  - Specifying Day Patterns..... 29
    - Applying Relative Day Patterns ..... 31
  - Setting Up Bell Schedules ..... 33
    - Setting Up Bell Schedule Periods ..... 33
    - Copying Periods from One Day to Another Day ..... 36
    - Copying Periods in All Days to Another Scheduling Group ..... 38

Creating Meeting Patterns.....	39
Setting Up Meeting Patterns for Blocked Periods - Example .....	42
Viewing Meeting Patterns.....	43
<b>Setting Up Homerooms and Subject Scheduling Rules .....</b>	<b>45</b>
Working with Constraints .....	45
Creating and Editing Constraints .....	45
Working with the Eligibility Control .....	51
Applying Constraints to Classes and Homerooms.....	56
Applying Constraints Using the Apply Constraints Page .....	56
Setting Up Homerooms for Scheduling.....	59
Printing a List of Homerooms.....	62
Scheduling Subjects.....	62
Setting Up Subject Scheduling .....	64
Scheduling Core and Specialty Subjects .....	65
<b>Defining Schedules for Classes .....</b>	<b>71</b>
Setting Up Classes .....	71
Changing Display Options in the Search Results Sections .....	74
Setting Up Classes by Subject .....	75
Setting Up Classes by Teacher .....	80
Setting Up Classes by Room .....	82
Working with Team Teaching.....	83
Example of Changing Teachers for Team Teaching Classes .....	83
Example of Transferring Students to Team Teaching Classes .....	84
Scenarios of Team Teaching .....	84
<b>Assigning Students to Homerooms and Classes .....</b>	<b>87</b>
Creating Student Schedules .....	87
Transferring Homerooms from Student Search Results.....	88
Changing Class Assignments .....	90
Changing Display Options on the Student Search Results Page.....	91
<b>Setting Up Resource Services (active calendar only) .....</b>	<b>93</b>
Creating Resource Services .....	93
Assigning Resource Services to Students .....	94
Tracking Resource Assignment Changes .....	96
<b>Working with Student Schedules .....</b>	<b>99</b>
Opening Student Schedules.....	99
Understanding the Student Schedule Page .....	100
Assigning and Reassigning Default Classes .....	102
Changing Classes Assigned to Students .....	103
Transferring Homerooms from Student Schedules .....	104
Using Subject Exceptions .....	105
Adding and Ending Subject Exceptions .....	106
Understanding Scheduling Exceptions and the Impact on Grading .....	106

---

Scheduling Resource Assignments.....	107
Viewing Change History .....	108
Reversing Student Schedule Changes .....	109
<b>Working with Homeroom and Class Rosters .....</b>	<b>111</b>
Viewing Class Rosters.....	111
Viewing Homeroom Rosters.....	112
Changing the Information Displayed on Roster Pages .....	113
Modifying Homeroom and Class Rosters.....	114
Changing Class Rosters .....	114
Adding Groups of Students to Other Classes .....	115
Assigning Groups of Students to Classes .....	116
Transferring Homerooms .....	118
<b>Section 2: Secondary Scheduling .....</b>	<b>121</b>
Permission to Work with Secondary Scheduling.....	121
Typical Scheduling Scenarios of Secondary and Middle Schools .....	123
Typical Scheduling Timetable.....	123
Scheduling in Planning and Active Calendars .....	124
Updating Statistics.....	125
Secondary Scheduling Overview .....	126
Understanding Chancery SMS Secondary School Scheduling Terminology .....	128
<b>Configuring Rooms, Staff, &amp; Courses .....</b>	<b>131</b>
Setting Up Rooms for Scheduling .....	131
Setting Up Staff for Scheduling .....	132
Setting Staff Scheduling Properties .....	132
Creating Placeholders for Scheduling .....	136
Converting Placeholders to Staff Members .....	138
Deleting Teacher Course Preferences .....	139
Setting Up Courses .....	140
Searching for Courses .....	140
Displaying Inactive Courses .....	145
Reviewing Course Scheduling Properties .....	145
Assigning Rooms to Courses .....	148
Reserving Periods in Student, Teacher, or Room Schedules .....	149
Creating Reservation Labels .....	150
Manually Assigning Teacher Preparation Periods - Example .....	152
Automatically Assigning Teacher Preparation Periods - Example .....	154
Automatically Assigning Students to Early or Late Starting Times - Example .....	156
Manually Assigning Students to Early or Late Start Times - Example .....	159
Setting Up Reservation Labels for Student/Teacher Meetings - Example .....	161

<b>Using Planning Schedules .....</b>	<b>165</b>
Creating Planning Schedules .....	165
Editing and Deleting Planning Schedules .....	168
Copying and Switching Planning Schedules.....	169
<b>Setting Up the Scheduling Structure .....</b>	<b>171</b>
Defining Scheduling Groups .....	171
Setting Up Scheduling Term Sets.....	173
Specifying Day Patterns.....	176
Applying Relative Day Patterns .....	179
Setting Up Special Days.....	180
Setting Up Bell Schedules .....	184
Setting Up Bell Schedule Periods .....	185
Copying Periods from One Day to Another Day .....	187
Copying Periods in All Days to Another Scheduling Group .....	189
Setting Up Meeting Patterns.....	190
Setting Up Meeting Patterns for Blocked Periods - Example .....	193
Viewing Meeting Patterns.....	194
<b>Configuring Student Loading Rules .....</b>	<b>197</b>
Setting Up Constraints.....	197
Creating and Editing Restriction Constraints .....	198
Creating and Editing Capacity Balancing Constraints .....	202
Working with the Eligibility Control .....	205
Applying Constraints to Classes .....	210
Setting Up Class Loading Rules.....	211
Defining Course Sequencing Rules .....	214
Defining Same/Different Attribute Rules .....	215
Defining Course Load Balancing Rules .....	217
Setting Up Team Loading Rules .....	218
Example of Using Overlapping in Scheduling Teams .....	219
Setting Up Teams .....	220
Assigning Teams to Classes .....	221
Assigning Specific Students to Teams .....	222
<b>Configuring Terms and Meeting Patterns for Courses .....</b>	<b>223</b>
Copying Course Offerings to Other Courses .....	225
Allowing Term Overrides for Courses .....	227
<b>Working with Student Search Results .....</b>	<b>231</b>
Searching for Student Records.....	231
Performing a Student Search .....	232
Performing a Quick Search .....	233
Performing a Basic Search .....	234
Performing a Detailed Search .....	235
Customizing How Student Search Results Display .....	239
Saving Your Search Results .....	240

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Changing Class Assignments for Multiple Students .....	242
Assigning Homerooms to Multiple Students .....	244
<b>Working with Course and Alternate Requests .....</b>	<b>247</b>
Entering Course and Alternate Requests for Individual Students .....	247
Assigning Course Requests .....	247
Assigning Alternate Requests .....	250
Using Notepad to Enter Student Course Requests.....	251
Deleting Course and Alternate Requests for Individual Students .....	253
Entering Course and Alternate Requests for Multiple Students.....	253
Copying Course Requests from One Student to Another .....	256
Using Saved Lists to Assign Course Requests.....	259
Creating a Saved List of Courses .....	259
Creating a Saved List of Students .....	260
Assigning Course Requests for a Saved List of Courses .....	260
<b>Creating the School Master Schedule .....</b>	<b>265</b>
Defining Class Scheduling Options.....	265
Analyzing Student Course Requests .....	267
Using the Course Request Tally .....	268
Creating Classes for the Coming School Year .....	274
Scheduling Teachers .....	276
Allocating Teachers to Classes .....	277
Understanding the Master Schedule Page.....	282
Creating School Master Schedules.....	285
Automatically Scheduling Classes .....	285
Manually Adding Classes to Courses .....	285
Editing Class Details .....	286
Manually Assigning and Removing Classes for Teachers .....	289
Manually Assigning and Removing Classes for Rooms .....	290
Locking Classes in the Master Schedule .....	291
Working With Class Combining .....	292
Copying Class Settings .....	293
Creating Lunch Periods.....	294
Full Period Lunches - Example .....	294
Four Lunch - Split Period with Length Difference - Example .....	298
Creating and Scheduling Study Hall Periods.....	302
Setting Up Study Halls to Replace Empty Periods - Example .....	303
Determining the Number of Study Hall Classes Required .....	305

<b>Loading Student Schedules .....</b>	<b>307</b>
Setting Student Loader Options .....	307
Using the Student Loader to Create Student Schedules .....	310
<b>Setting Up Resource Services (active calendar only) .....</b>	<b>313</b>
Creating Resource Services .....	313
Assigning Resource Services to Students .....	314
Tracking Resource Assignment Changes.....	316
<b>Selecting a Planning Schedule (planning calendar only) .....</b>	<b>319</b>
<b>Working with Student Schedules .....</b>	<b>321</b>
Opening Student Schedules.....	321
Understanding the Student Schedule Page .....	322
Specifying Effective Dates for Schedule Changes .....	328
Scheduling Walk-In Students.....	328
Manually Adding, Dropping, or Transferring Classes.....	329
Searching for Classes for Multiple Courses .....	330
Overview of Transferring Grades and Reassigning Attendance.....	334
Transferring Grades and Reassigning Attendance .....	335
Transferring Grades and Attendance - Examples .....	338
Viewing an Audit Trail of Changes to Grades and Attendance .....	340
Locking Classes in Student Schedules .....	344
Adding and Deleting Resource Assignments.....	345
Viewing Change History .....	345
Reversing Student Schedule Changes .....	347
<b>Working with Homeroom and Class Rosters .....</b>	<b>349</b>
Viewing Class Rosters.....	349
Viewing Homeroom Rosters.....	350
Changing the Information Displayed on Roster Pages .....	351
Modifying Homeroom and Class Rosters.....	352
Changing Class Rosters .....	352
Adding Groups of Students to Other Classes .....	353
Assigning Groups of Students to Classes .....	354
Transferring Homerooms .....	355
<b>Index .....</b>	<b>359</b>



# About Chancery SMS

Welcome to Chancery SMS® from Pearson. Chancery SMS is a software tool for managing student and family information in your school district.

## Support Services Available

Chancery offers a full suite of documentation, online Help, and technical support to help you with your day-to-day tasks.

## Documentation Included

The following documentation is included with Chancery SMS:

See	For
Chancery SMS Guides	<p>The following guides are available in PDF format from our support web site at <a href="http://support.chancery.com">http://support.chancery.com</a>:</p> <ul style="list-style-type: none"><li>• District Administration Guide: For district administrators, the District Administration Guide provides information about maintaining the centralized Chancery SMS solution, including setting up your district, adding schools to the district, and standardizing data across the district using setup lists.</li><li>• District User Guide: For district office staff, the District User Guide provides information about using Chancery SMS at a district level, including registering and enrolling students and working with student data.</li><li>• School Administration Guide: For school administrators, the School Administration Guide provides information about maintaining a school and performing administrative tasks.</li><li>• School Setup Guide: The School Setup Guide provides information about setting up schools in the district, including the steps to be performed as a district administrator and as a school administrator.</li><li>• School User Guide: For school office staff, the School User Guide provides information about using Chancery SMS at the school level, including how to take attendance, enter grades, and work with student data in the office.</li><li>• Chancery SMS in the Classroom: This guide covers the basics of using Chancery SMS at the homeroom and class level, including how to take attendance, enter grades, and work with student data in the classroom.</li></ul>

<b>See</b>	<b>For</b>
Chancery SMS Speciality Guides	<p>Additional feature-specific guides to supplement the standard guides are available in PDF format from our support web site at <a href="http://support.chancery.com">http://support.chancery.com</a>:</p> <ul style="list-style-type: none"> <li>• <b>Address Validation Guide:</b> For school and district administrators, the Address Validation Guide provides information about setting up address validation at the district and performing address validation tasks at the district and at schools.</li> <li>• <b>cTools Guide:</b> This guide provides information about customizing Chancery SMS, along with instructions for using the customization features.</li> <li>• <b>Grading Setup Guide:</b> For school administrators, the Grading Setup Guide provides information about setting up grading properties and performing grading-related tasks.</li> <li>• <b>Permissions Guide:</b> For district administrators, this guide provides information about setting up permissions in Chancery SMS. The Permissions Guide explains the permission structure and provides information about each permission's dependencies, effect on the system, options, and defaults.</li> <li>• <b>Program Management Guide:</b> For district and school administrators and district and school staff who enroll students and process applications, the Program Management Guide is a feature-specific guide that describes the process of setting up programs at the district and at schools and performing program-related tasks.</li> <li>• <b>Registration and Enrollment Quick Guide:</b> For school and district staff, the Registration and Enrollment Quick Guide provides procedures for registering students in the district and enrolling students in schools.</li> <li>• <b>Scheduling Guide:</b> For school administrators, the Scheduling Guide covers the process of setting up a school scheduling structure, as well as scheduling in elementary and secondary schools.</li> <li>• <b>Next-Year Preparation and Year-End Processing Guide:</b> For district and school administrators, this guide covers all the steps required to close off the current school year and prepare for the next.</li> </ul>

<b>See</b>	<b>For</b>
Chancery SMS Technical Guides	<p>Technical guides are available in PDF format from our support web site at <a href="http://support.chancery.com">http://support.chancery.com</a>:</p> <ul style="list-style-type: none"> <li>• Import/Export Guide: For district administrators, the Import/Export Guide describes the process for importing and exporting data into and out of Chancery SMS.</li> <li>• Interoperability Guide: For district administrators, the Interoperability Guide covers how to integrate third-party applications with Chancery SMS using SIF and Import/Export functionality.</li> <li>• Report Writer Guide: For district and school administrators and third-party report writers, the Report Writer Guide covers how to plan, build, and upload reports using the new reporting framework. The guide also includes an in-depth examination of this framework, extensive information about how to use Crystal Reports® functionality, and reference material about using previous reporting methods.</li> </ul>
Chancery SMS Online Help	Help is available by accessing the Help menu from the task bar.
Release Notes	Release Notes are summaries of the new features and changes in the current release.
Installation Documentation	<p>The Installation Guide provides technical details for installing the entire Chancery SMS system.</p> <p>The Upgrade Guide provides detailed instructions for upgrading from a prior version of Chancery SMS.</p>

## Getting Training

Training courses are available to help ensure you get every advantage from your student information system. We are committed to helping you put our solutions to work. Our broad training offerings are designed with you in mind so that you'll receive the most suitable and effective training for your needs.

Choose from on site training or live online training. We can also create a customized training program to meet your district's needs.

Phone us toll free at 1-800-999-9931 or see the Training area of our customer support web site at <http://support.chancery.com> for an up-to-date list of scheduled courses.

## Getting Support

The following support programs are available by subscription only:

Support	Description
One-on-one Technical Support	<p>Talk to a technical support analyst to help solve problems and answer questions when software doesn't produce the expected results. Analysts can use the telephone or Internet access to troubleshoot your issues.</p> <p>Monday to Friday, 5 am to 5 pm Pacific Time Phone: 1-800-688-9939 Fax: 1-800-446-5650 Email: psstechsupp@pearson.com</p>
Access to our web site	<p><a href="http://support.chancery.com">http://support.chancery.com</a> In Chancery SMS, from the Help menu, click Support Website.</p> <p>Our web site includes a searchable KnowledgeBase with frequently asked questions, tips, and troubleshooting instructions, as well as support forums for users to share experience and knowledge.</p>
Software updates	<p>Releases of new versions with improved functions and software updates. Updates are provided free of charge for three months from your date of purchase and are included in the subscription to Support Programs.</p>

For more information about Technical Support Programs, phone Customer Service at 1-800-999-9931.

# Scheduling Overview

Scheduling involves specifying how courses or subjects are offered at your school, assigning teachers and rooms to courses or subjects, and finally creating student schedules. Typically, you create the initial schedule in a planning calendar. After you run Year End Processing (YEP), the planning calendar becomes the active calendar and you continue to make adjustments to the school schedule throughout the school year. Some scheduling tasks can only be completed in the planning calendar and others can only be completed in the active calendar.

Chancery SMS provides two scheduling methods: elementary school and secondary school. Before you begin scheduling your school, determine the method best suited to your school and select the scheduling method you will use.

## NOTE

Once you create schedules, you cannot change the scheduling method.

Since scheduling is significantly different for elementary and secondary schools, the remainder of this guide is divided into two sections. Once you determine the type of scheduling your school requires, refer to the appropriate section for the type of scheduling your school uses:

- "Section 1: Elementary Scheduling" on page 15
- "Section 2: Secondary Scheduling" on page 121

## Understanding Chancery SMS Scheduling Options (for Win School and Mac School Users)

This section is for former Win School and Mac School users only. If you are new to Chancery SMS, this is a summary of how Chancery SMS handles some of the Win School and Mac School scheduling options you are familiar with.

Option	Description
Lookahead	Master Schedule Builder (Schedule Classes) already examines all possible room and teacher combinations that can be assigned to each class before it actually schedules the class into the master schedule.
Schedule only selected courses	This is always on as only selected courses are scheduled.
Keep teachers in homerooms	This is now in the Use Teacher Room Preferences option.
Ignore rooms and teachers	You can achieve this by turning off the Use Teacher Room Preferences and Use Course Room Preferences options.
Allowable potential conflicts	This is not needed as Master Schedule Builder uses a scheduling algorithm that minimizes conflicts.
Select teacher for class from course preferences or from load teachers	This is not needed as Master Schedule Builder uses both options.
Start scheduling with special courses or normal courses	This is not needed as Master Schedule Builder gives priority to the most constrained courses first. You can also select specific courses that you want to schedule first.
When problems occur, stop, pause, or continue	This is not needed as scheduling will always finish and generate a detailed log.

Option	Description
Pre-check	This information is in the Scheduling Pre-Check Report.
Optimize	Master Schedule Builder (Schedule Classes) always optimizes the master schedule by moving classes to different meeting patterns (periods) in the school day to obtain a better master schedule.
Period scrambling	This is not needed. Use meeting patterns to achieve this.
Doubles together	This is not applicable in Chancery SMS as the meeting patterns defined for the class determine where doubles will be assigned in the master schedule.
Force same period each day	This can be controlled at the course level by assigning specific courses a set of meeting patterns that load the sections of the course to the same period each day.

## Differences Between Elementary and Secondary Scheduling Methods

Since scheduling in elementary schools can be significantly different from scheduling in secondary schools, Chancery SMS offers two methods of scheduling: elementary school and secondary school.

The elementary school scheduling method is suitable for schools with the following characteristics:

- The school schedule is primarily structured around homerooms.
- The homeroom teacher teaches most of the subjects to the same group of students. You can adjust individual student schedules by transferring them to other classes, as well as by using subject exceptions and resource assignments to support special cases.

The secondary school scheduling method is suitable for schools with the following characteristics:

- Students choose some or all the courses they want to take.
- For each class, students go to a different room with a different group of students.
- Different bell schedules or different start and end dates for each term are needed to accommodate the needs of different groups of students. (Data mapping does not support different bell schedules.)
- Complex meeting patterns are required.
- Teams or “platoons” of students are rotated through a series of “exploratory” classes (middle schools).

The following table shows the basic differences between the elementary school scheduling method and secondary school scheduling method, including differences in terminology:

<b>Elementary School</b>	<b>Secondary School</b>
Students usually stay together for most of the day in a room called the homeroom.	For each class, students usually go to a different room with different students. The homeroom, if used, is usually only for announcements.
Students in each grade are usually assigned the same set of subjects, which they take for the whole school year.	Offers flexible terms that support any combination of semesters, quarters, or middle school style class rotations. Students make individual course requests.
Uses the terms "subject" and "subject framework". You use the subject framework and subjects for scheduling.	Uses the terms "course" and "course catalog" or "course list". You use the course catalog or course list and courses for scheduling.
Subjects are offered as core or specialty subjects.	Courses are offered as required or elective courses.
The grading structure is relatively simple.	The grading structure is more complex.
You can take once daily or twice daily attendance. You cannot take attendance by class.	You can take once daily, twice daily, or class attendance.
Chancery SMS uses the elementary school style of report cards, including grading table options.	Chancery SMS uses the secondary school style of report cards, including grading table options.

## Selecting the Scheduling Method

Once you decide which scheduling method is best suited to your school, select the scheduling method. The scheduling method you select determines the type of attendance, grading, and report cards that are available.

You specify the scheduling method when you set up general attendance and scheduling settings for your school.

### NOTE

Once you create schedules, you cannot change the scheduling method (e.g., from elementary to secondary scheduling or secondary to elementary scheduling).

### To select the scheduling method:

- 1** Log on as a school administrator.
- 2** In the control bar, under Admin, click School Setup.
- 3** On the School Setup page, under School, click General Settings.

- 4 On the General Settings page, under Scheduling General Settings, select the method your school uses for scheduling.

School Setup > General Settings

Help | Home | Log off |

Scheduling General Settings

School is scheduled as:

Elementary (homerooms and pull-outs)

Secondary (periods and classes)

Note: This setting cannot be changed once schedules have been created for this calendar year. Elementary scheduling cannot be used with class attendance.

Class periods are contiguous if separated by no more than  passing period minutes.

Note: This setting is used when school attendance is set to "By class" (see below) and for instructional minutes calculations when meeting patterns block 2 or more adjacent periods together. It cannot be changed once attendance has been taken in this calendar year.

- 5 Click OK.

## Defining Contiguous Periods

Contiguous class periods are classes that span multiple periods but should be considered a single class, for example, a chemistry class and chemistry lab scheduled into adjacent periods.

For attendance calculations when the attendance method is set to By Class and for instructional minute calculations, Chancery SMS can consider two classes scheduled into adjacent periods to be the same class.

Multi-period classes are considered contiguous when the classes satisfy the following requirements:

- Both classes have the same name. For example, two consecutive classes named Chemistry and Chemistry Lab are always treated as two classes; while two consecutive classes named Science are considered a single class if they meet the passing minutes requirement.
- The number of passing time minutes between the two consecutive classes does not exceed the number specified in the "Class periods are contiguous if separated by no more than *nn* passing time minutes" field.

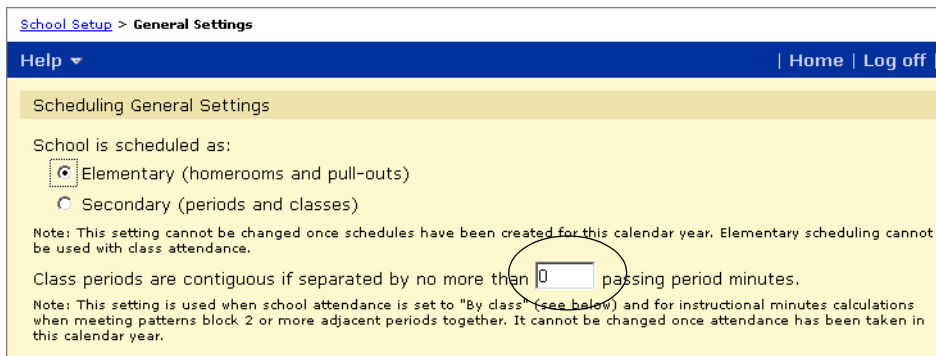
For example, if you set the passing time minutes to 8 minutes and your school allows 5 minutes between classes for students to get to the next class then a two-period class is considered one contiguous class (5 is less than 8). If your school's bell schedule has 10 minutes between classes then a two-period class is considered two classes (10 is more than 8).

### To specify the number of passing minutes for contiguous classes:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click School Setup.
- 3 On the School Setup page, under School, click General Settings.



- On the General Settings page, under Scheduling General Settings, specify the maximum number of minutes that can separate contiguous classes.



- Click OK.

## Switching to the School Planning Calendar

If you are scheduling your school for the next calendar year, you may need to work in the planning calendar. The planning calendar gives you a different view of Chancery SMS so you can access only the features that apply to Next Year Preparation. You can switch between the active calendar and the planning calendar at any time.

For more information about planning calendars, see the Chancery SMS School Setup Guide.

### To switch calendars:

- Log on as a school administrator.
- Do one of the following:
  - From the Actions menu, click Switch Calendar.
  - In the control bar, click School Setup. On the School Setup page, under Calendar, click School Calendars.
- On the School Calendars page, in the Work With column, click the button next to the calendar you want to work with.

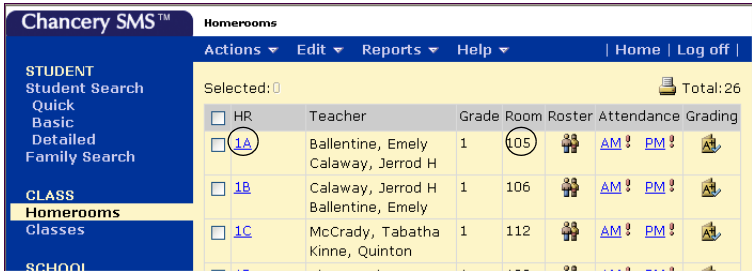
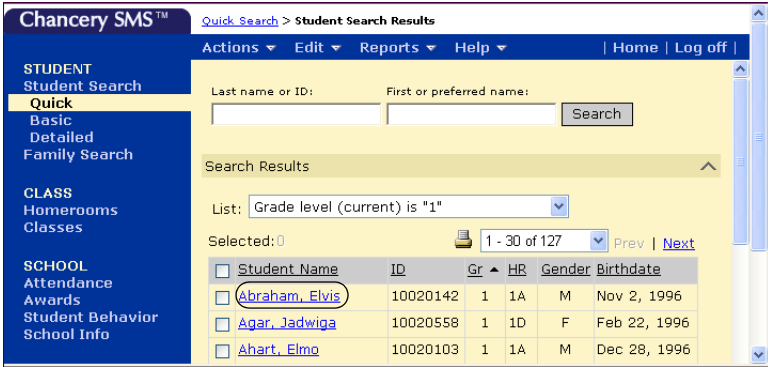
Switch to a calendar by selecting Work With in the appropriate row

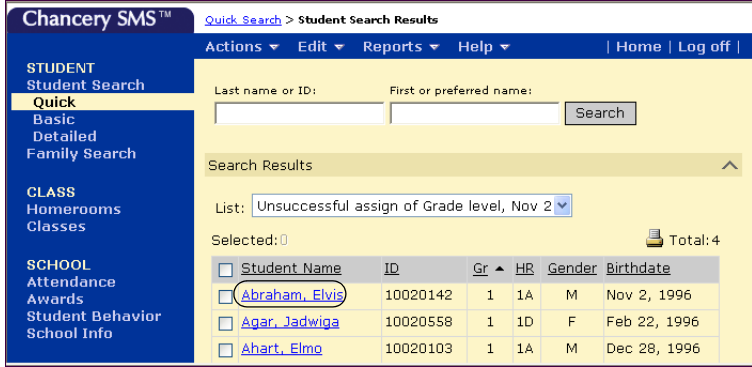
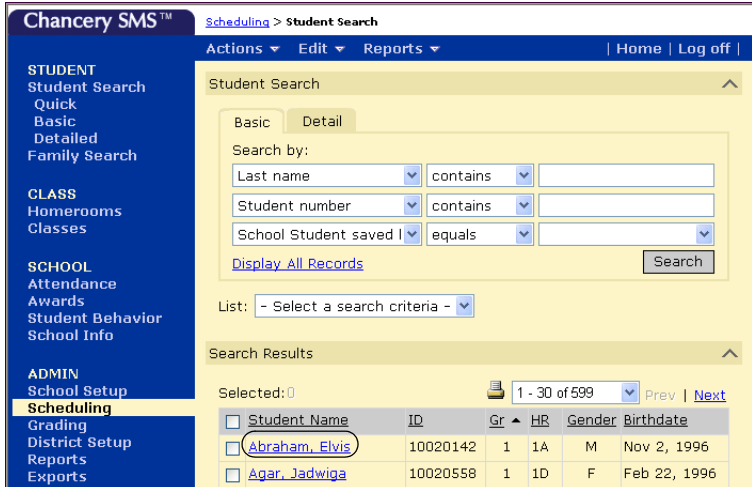
<input type="checkbox"/>	*School calendar name	*Start (mm/dd/yyyy)	*End (mm/dd/yyyy)	Associated District Calendar	Type	Work with
<input type="checkbox"/>	2004/2005	08/28/2004	08/27/2005	2004 - 2005	Planning	
<input type="checkbox"/>	2003/2004	08/28/2003	08/27/2004	2003 - 2004	Active	

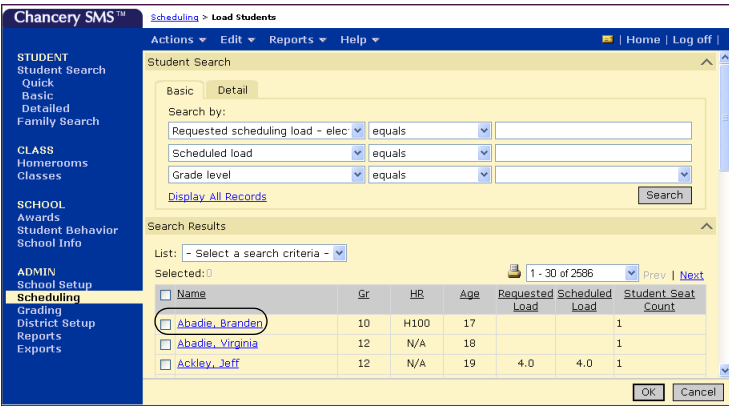
- Click OK.  
Planning Calendar appears at the top of the control bar.

## Working With Student Records

When you set up student schedules, you may need to work with student records. In Chancery SMS, there are several ways to open student records. For example, you can open a student record from any type of roster, such as a homeroom roster, class roster, or attendance roster. On any page that contains a list of students, you can click the student record you want to open.

Task	Procedure
<p>Open a student record from a homeroom roster</p>	<ol style="list-style-type: none"> <li>In the control bar, under Class, click Homerooms.</li> <li>On the Homerooms page, in the HR column, click the homeroom the student is in.</li> </ol> <p>OR</p> <p>In the Roster column, click the Roster icon.</p>  <ol style="list-style-type: none"> <li>On the Roster page, click the student record you want to view or edit.</li> </ol>
<p>Open a student record from a list of search results</p>	<ol style="list-style-type: none"> <li>Perform a Quick, Basic, or Detailed Search.</li> <li>On the Student Search Results page, from the Student Name column, click the student record you want to view or edit.</li> </ol> 

Task	Procedure																								
<p>Open a student record from a saved list</p>	<ol style="list-style-type: none"> <li>1 On the Quick Search page, under Saved Lists, click the saved list the student is part of.</li> <li>2 On the Student Search Results page, from the Student Name column, click the student record you want to view or edit.</li> </ol>  <p>The screenshot shows the 'Quick Search &gt; Student Search Results' page. The search results table is as follows:</p> <table border="1"> <thead> <tr> <th>Student Name</th> <th>ID</th> <th>Gr</th> <th>HR</th> <th>Gender</th> <th>Birthdate</th> </tr> </thead> <tbody> <tr> <td>Abraham, Elvis</td> <td>10020142</td> <td>1</td> <td>1A</td> <td>M</td> <td>Nov 2, 1996</td> </tr> <tr> <td>Agar, Jadwiga</td> <td>10020558</td> <td>1</td> <td>1D</td> <td>F</td> <td>Feb 22, 1996</td> </tr> <tr> <td>Ahart, Elmo</td> <td>10020103</td> <td>1</td> <td>1A</td> <td>M</td> <td>Dec 28, 1996</td> </tr> </tbody> </table>	Student Name	ID	Gr	HR	Gender	Birthdate	Abraham, Elvis	10020142	1	1A	M	Nov 2, 1996	Agar, Jadwiga	10020558	1	1D	F	Feb 22, 1996	Ahart, Elmo	10020103	1	1A	M	Dec 28, 1996
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<p>Open a student record from the Scheduling page (Elementary schools only)</p>	<ol style="list-style-type: none"> <li>1 In the control bar, under Admin, click Scheduling.</li> <li>2 On the Scheduling page, under Step 5, click Student Search.</li> <li>3 Perform a Basic or Detailed search or click Display All Records.</li> <li>4 From the Search Results, from the Student Name column, click the student record you want to view or edit.</li> </ol>  <p>The screenshot shows the 'Scheduling &gt; Student Search' page. The search results table is as follows:</p> <table border="1"> <thead> <tr> <th>Student Name</th> <th>ID</th> <th>Gr</th> <th>HR</th> <th>Gender</th> <th>Birthdate</th> </tr> </thead> <tbody> <tr> <td>Abraham, Elvis</td> <td>10020142</td> <td>1</td> <td>1A</td> <td>M</td> <td>Nov 2, 1996</td> </tr> <tr> <td>Agar, Jadwiga</td> <td>10020558</td> <td>1</td> <td>1D</td> <td>F</td> <td>Feb 22, 1996</td> </tr> </tbody> </table>	Student Name	ID	Gr	HR	Gender	Birthdate	Abraham, Elvis	10020142	1	1A	M	Nov 2, 1996	Agar, Jadwiga	10020558	1	1D	F	Feb 22, 1996						
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Agar, Jadwiga	10020558	1	1D	F	Feb 22, 1996																				

Task	Procedure
<p>Open a student record from the scheduling page (Secondary schools only)</p>	<ol style="list-style-type: none"> <li>1 In the control bar, under Admin, click Scheduling.</li> <li>2 If you are using the active calendar, on the Scheduling page, under Step 6, click Load Students.  OR If you are using a planning calendar, on the Scheduling page, under Step 7, click Load Students.</li> <li>3 Perform a Basic or Detailed search or click Display All Records.</li> <li>4 From the Search Results, from the Student Name column, click the student record you want to view or edit.</li> </ol>  <p>The screenshot shows the 'Chancery SMS' interface with the 'Scheduling &gt; Load Students' page. The left sidebar contains navigation menus for STUDENT, CLASS, SCHOOL, and ADMIN. The 'Scheduling' option under ADMIN is highlighted. The main area shows a 'Student Search' form with 'Basic' and 'Detail' tabs. The 'Basic' tab is active, showing search criteria for 'Requested scheduling load - elec', 'Scheduled load', and 'Grade level', all set to 'equals'. Below the search form is a 'Search Results' section with a table of results. The table has columns for Name, Gr, HR, Age, Requested Load, Scheduled Load, and Student Seat Count. Three results are shown: Abadie, Brandon (Gr 10, HR H100, Age 17), Abadie, Virginia (Gr 12, HR N/A, Age 18), and Ackley, Jeff (Gr 12, HR N/A, Age 19, Requested Load 4.0, Scheduled Load 4.0). The 'Abadie, Brandon' row is selected.</p>

# Data Mapping Constraints for Scheduling

As Chancery SMS continues to mature and we strive to improve and enhance the existing architecture, we do have some constraints on the systems due to “legacy” code development, code which dates back to the original versions of the product. The “legacy” architecture necessitates data setup constraints, which then require a data mapping process to consolidate the data in the common tables.

If your district relies on data mapping, make sure you understand and follow the documented data setup constraints. For more information, see the Data Mapping Constraints Technical Bulletin, available for download from the Chancery Support web site.

There are a number of scheduling data setup constraints to be aware of. If your scheduling data is not set up to support these constraints, data mapping might fail or data will not be reported or uploaded correctly. If you are not using data mapping, you do not need to set up your data to support these constraints.

## **IMPORTANT NOTE**

**For Tennessee customers only:** EIS Reporting requires data mapping. Make sure your data is set up to support these constraints.

## **NOTE**

Schools maintaining data in Win School or Mac School are not required to run data mapping.

## Period Structure

The period structure is part of a bell schedule. To set up a bell schedule, go to Scheduling > Bell Schedules > Add Period page. For more information, see “Setting Up Bell Schedules” on page 33 for elementary schools or “Setting Up Bell Schedules” on page 184 for secondary schools.

- Each day in the day pattern must have the same bell schedule/period structure, including the same periods and the same number of instructional minutes in periods with the same code. For example, if on Monday, period 1 had 50 instructional minutes, period 1 must have 50 instructional minutes for every day in the day pattern. Periods within one day can have different amounts of instructional minutes.
- Each day in the day pattern can have a maximum of 42 periods.
- Periods cannot overlap.
- If more than one scheduling group is defined (e.g., to support exception days), the bell schedule must be the same in both scheduling groups, that is, the period codes and period start and end times must be the same.

## Special Days

Special Days are not supported. Use the same bell pattern for all days in the day pattern. You can create different meeting patterns based on the bell schedule to accommodate different class types.

For more information about setting up meeting patterns, see “Creating Meeting Patterns” on page 39 for elementary schools or “Setting Up Meeting Patterns” on page 190 for secondary schools.

## Terms

Elementary school scheduling does not support multiple terms.

For Secondary Schools, define terms on the Scheduling > Term Sets > Add Term Set page. For more information, see "Setting Up Scheduling Term Sets" on page 173.

- You can define a maximum of 12 unique term ranges for each school year. If you can combine terms to form another term, that term does not count toward the maximum number of allowed terms. For example, if you have three term sets (year, quarters, and semesters) then the total number of terms is seven (1 + 4 + 2). However, since you can combine the quarters to form both the semesters and the year, only the four terms in the quarters are counted toward the maximum number of terms.
- Terms within the same term set cannot overlap.

## Class Attributes

Based on the course catalog created at the district, create classes for all courses taught at a school. Class information for secondary schools is entered on the Scheduling > Master Schedule page. For more information, see "Creating the School Master Schedule" on page 265. For elementary schools, it is entered on the Scheduling > Class Setup page. For more information, see "Setting Up Classes" on page 71.

Each time a class meets, the room and each of the assigned teachers can differ from any other time a class meets.

## Class Teachers

When you create classes, assign up to three teachers to a class. For secondary schools, this information is entered on the Scheduling > Master Schedule page. For more information, see "Creating the School Master Schedule" on page 265. For elementary schools, it is entered on the Scheduling > Class Setup page. For more information, see "Setting Up Classes" on page 71.

- Teacher 1 maps to Main Teacher.
- Teacher 2 maps to Team Teacher.
- Teacher 3 maps to Teacher Aide.

## Reservation Labels

Data mapping does not copy reservation labels.

# Section 1: Elementary Scheduling

In elementary school scheduling, all students are assigned to homerooms. Based on their homeroom assignments, students are automatically assigned to core classes. You can then adjust individual student schedules by assigning specialty classes, subject exceptions, or resource services. You can also transfer students to other classes. If desired, you can create a schedule structure and assign meeting patterns to classes. Using a schedule structure allows you to track instructional minutes for classes, but it is not required for elementary school scheduling.

## NOTE

**For Tennessee customers only:** EIS reporting does not use the schedule structure when calculating instructional minutes. Enter class schedule information in the Assigned Period and Duration fields by clicking the Custom link on the Class Setup page. For more information, see “Setting Up Classes by Subject” on page 75.

## Scheduling in Planning and Active Calendars

Although you will likely adjust the scheduling setup throughout the school year, most scheduling tasks are completed in the planning calendar. When you schedule your elementary school in the planning calendar, you likely follow distinct steps. These steps are represented on the Scheduling page to help you proceed through the scheduling process. For each step, the Scheduling page shows statistics that help you determine the current status of the step.

## NOTE

If the statistics do not seem correct, you can update statistics to refresh the calculations. For more information, see “Updating Statistics” on page 16.

In the planning calendar, the steps do not include any tasks that must be completed in the active calendar, such as setting up resource services.

The screenshot shows a web interface titled "Scheduling" with a navigation bar containing "Actions", "Reports", "Help", "Home", and "Log Off". Below the navigation bar is a section titled "Suggested steps for scheduling setup" which contains five steps, each with a list of sub-tasks and associated statistics.

Step	Sub-tasks	Statistics
Step 1: Set up basic scheduling elements	<a href="#">Staff List</a> <a href="#">Room Setup</a> <a href="#">Subject Framework</a>	51 staff members 27 rooms 62 core, 29 specialty
Step 2: Set up the schedule structure (if you wish to track instructional minutes)	<a href="#">Scheduling Groups</a> <a href="#">Day Pattern</a> <a href="#">Bell Schedules</a> <a href="#">Meeting Patterns</a> <a href="#">Scheduling Defaults</a>	2 groups 5 regular and 0 special days 0 bell schedules 0 meeting patterns Homerooms / Classes
Step 3: Set up homerooms and subject scheduling rules	<a href="#">Constraints</a> <a href="#">Homerooms</a> <a href="#">Subject Scheduling</a>	5 class constraints 28 homerooms set up
Step 4: Define schedules for classes	<a href="#">Class Setup</a>	0 classes
Step 5: Assign students to homerooms and classes	<a href="#">Student Search</a> <a href="#">Create Student Schedules...</a>	0/459 students in homerooms 0/459 students with auto-scheduled classes

Annotations: A line from the text "Planning Calendar Scheduling page includes scheduling steps available in the planning calendar." points to the left side of the screenshot. Another line from the text "The right column displays statistics that show the status of each step." points to the right side of the screenshot.

When you work in the active calendar, the Scheduling page still displays the tasks as steps. However, when you work in the active calendar, the initial schedule is usually already set up and you do not need to follow the steps in order. You will likely revisit steps as required.

The screenshot shows the 'Scheduling' page with a navigation bar at the top containing 'Actions', 'Reports', and 'Help'. Below the navigation bar is a section titled 'Suggested steps for scheduling setup'. This section contains six steps, each with a description and associated statistics. A callout box on the left points to the steps, stating: 'In the Active Calendar, scheduling tasks are shown as steps although once the initial schedule is set up, you need not follow the steps in order.' A callout box on the right points to the statistics column, stating: 'The right column displays statistics that show the status of each step.'

Step	Description	Statistics
Step 1:	Set up basic scheduling elements <a href="#">Staff List</a> <a href="#">Room Setup</a> <a href="#">Subject Framework</a>	51 staff members 27 rooms 62 core, 29 specialty
Step 2:	Set up the schedule structure (if you wish to track instructional minutes) <a href="#">Scheduling Groups</a> <a href="#">Day Pattern</a> <a href="#">Bell Schedules</a> <a href="#">Meeting Patterns</a> <a href="#">Scheduling Defaults</a>	2 groups 5 regular and 0 special days 10 bell schedules 11 meeting patterns Homerooms / Classes
Step 3:	Set up homerooms and subject scheduling rules <a href="#">Constraints</a> <a href="#">Homerooms</a> <a href="#">Subject Scheduling</a>	5 class constraints 28 homerooms set up
Step 4:	Define schedules for classes <a href="#">Class Setup</a>	286 classes
Step 5:	Assign students to homerooms and classes <a href="#">Student Search</a> <a href="#">Create Student Schedules...</a>	521/530 students in homerooms 486/530 students with auto-scheduled classes
Step 6:	Set up resource services <a href="#">Resource Services</a> <a href="#">Resource Roster</a>	11 services configured 0 assignments for 0 students

## Updating Statistics

Scheduling statistics appear on the Scheduling page to indicate the status of the scheduling steps. As you work through the steps for scheduling, these statistics may not refresh automatically. If the numbers do not seem correct, you can update the statistics.

### NOTE

Updating statistics may affect performance in Chancery SMS. It should not be necessary to update statistics as part of your regular processing. If statistics are frequently incorrect, contact technical support for assistance.

### To update statistics:

- 1 Log on as a school administrator at an elementary school.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, from the Actions menu, click Update Statistics.
- 4 Click OK.

## Elementary Scheduling Overview

The following steps describe the overall process of scheduling for elementary schools:

### Step 1 - Set Up Basic Scheduling Elements

Make sure staff, rooms, and subjects are set up correctly for your school. See "Setting Up Basic Scheduling Elements" on page 23.



**Step 2 - Set Up the Schedule Structure (optional)**

If you want to track instructional minutes, you must set up the schedule structure. When you set up the schedule structure, you define scheduling groups, day patterns, bell schedules, meeting patterns, and scheduling defaults that are used to schedule classes for specific times. You can then create reports to track the number of minutes allocated to each class. For more information about the scheduling structure, see "Setting Up the Scheduling Structure" on page 27.

**NOTE**

**For Tennessee customers only:** EIS reporting does not use the schedule structure when calculating instructional minutes. Enter class schedule information in the Assigned Period and Duration fields by clicking the Custom link on the Class Setup page. For more information, see "Setting Up Classes by Subject" on page 75.

**Step 3 - Set up Homerooms and Subject Scheduling Rules**

Define constraints, set up homerooms, and build homeroom rosters then specify how subjects are scheduled. For more information about homerooms and subject scheduling, see "Setting Up Homerooms and Subject Scheduling Rules" on page 45.

**Step 4 - Define Schedules for Classes**

Adjust class schedules by changing assigned teachers, assigning additional teachers, assigning rooms, and assigning meeting patterns to classes. For more information about class schedules, see "Defining Schedules for Classes" on page 71.

**Step 5 - Assign Students to Homerooms and Classes**

Create and adjust student schedules by assigning students to homerooms and classes. For more information about creating student schedules, see "Assigning Students to Homerooms and Classes" on page 87.

**Step 6 - Setup Resource Services**

This step is only available in the active calendar.

Create resource services and assign them to students. For more information about resource services, see "Setting Up Resource Services (active calendar only)" on page 93.

**Permission to Work with Elementary School Scheduling**

To work with Elementary School Scheduling, you need the following permissions:

To	You need this permission	Set to
Switch school calendars, e.g., switch to the school planning calendar	School Setup>Define School Calendars	Yes
Specify calendar day exceptions and special days, such as holidays and professional development days, for the active calendar	School Setup>Calendar Day Exceptions	Delete
Create and edit day types	School Setup>Day Type Setup List	Yes
View the subject framework	School Setup>Subject Framework/Course Catalog	View

## Chancery SMS Scheduling Guide

To	You need this permission	Set to
Schedule core and specialty subjects	School Setup>Subject Scheduling	Edit
	School Setup>Subject Framework / Course Catalog	View or Edit
Add, edit, and delete buildings	Facilities Management>Buildings	Delete
	School Setup>Secondary Scheduling Setup	Yes
Add, edit, and delete rooms	Facilities Management>Rooms	Delete
	School Setup>Secondary Scheduling Setup	Yes
Set up the scheduling structure, including the following: <ul style="list-style-type: none"> <li>• Scheduling Groups</li> <li>• Day patterns</li> <li>• Bell Schedules</li> <li>• Meeting patterns</li> <li>• Scheduling defaults</li> </ul>	School Setup>Secondary Scheduling Structure Setup	Yes
Define schedules for classes	School Setup>Classes	Yes
	School Setup>Secondary Scheduling Setup	Yes
Define class or homeroom constraints	School Setup>Define Constraints - School	Delete
Schedule a student into a class for which they do not satisfy the defined constraints	School Setup>Override Constraints	Yes
Assign default classes based on student homerooms	School Setup>Subject Scheduling	Edit, Delete, or None
	School Setup>Edit Student Schedules	Yes
Re-assign default classes based on student homerooms	School Setup>Subject Scheduling	Edit
	School Setup>Edit Student Schedules	Yes
Create resource services	School Setup> Resource Services	Delete
Update Statistics	School Setup>Change Planning Schedule	Yes
Assign resource services to students	Students>Resource Assignments	Delete
	Students>Edit Student Schedules	Edit
Set up homerooms for scheduling	School Setup>Homerooms	Delete
Assign homerooms to students	Students>Assign Homerooms	Yes
Make changes to student schedules, including adding, deleting, and transferring classes, transferring homerooms, adding subject exceptions, and assigning resource services	Students>Edit Student Schedules	Yes

By default, the school administrator role can perform all scheduling tasks. For more information about permissions, see "Controlling User Access" in the Chancery SMS District Administration Guide.

## Understanding Chancery SMS Elementary School Scheduling Terminology

Before you begin the scheduling process at your elementary school, it is important to understand the terminology Chancery SMS uses relating to subjects and subject framework, such as the difference between a homeroom and a class, and how subjects relate to both. The following definitions help you understand this terminology as it relates to Chancery SMS:

Term	Definition
Homeroom	A group of students, usually in the same grade, who spend most of their time together. In a homeroom, students have attendance taken and receive instruction in core subjects, such as Math, Language Arts, and Social Studies. For example, Homeroom 1-A is a Grade 1 homeroom where twenty-five Grade 1 students spend most of their time.
Class	A group of students who meet regularly to receive instruction in a subject from a specific teacher. For example, Band 4 meets Tuesdays and Thursdays at 2 pm with Mr. Bell providing instruction for thirty Grade 4 students.
Subject	A set of instructional topics and objectives taught to students, often for the entire school year. For example, Science is a subject that is taught to all Grade 4 students for the whole year.
Rooms	Specify the location of classes not taught in the homeroom. Typically, in elementary schools, classes are taught in the homeroom. If a class is not taught in the homeroom, you can specify a different room. For example, all computer classes are taught in the computer lab in room 102.

If you want to assign specific meeting times to specific classes or create a multiple track schedule, you must set up the scheduling structure. The following definitions help you understand the terminology as it relates to elementary scheduling structures:

Term	Definition
Scheduling group	A group of students that use the same bell schedule and meeting patterns. By default, elementary school scheduling includes two scheduling groups: homerooms and classes.
Day pattern	The cycle of days that your school uses. For example, your school can use a days-of-the-week pattern from Monday to Friday or it can use a relative-day pattern using a set number of days in a cycle, such as Day 1 to Day 4 in a four-day relative cycle. If your school does not use data mapping, you can add special days to your day pattern, such as parent-teacher interview days, professional development days, or early dismissal days.

Term	Definition
Bell schedule	Consists of the start and end times of periods throughout the day. If your school does not use data mapping, you can have a different bell schedule for each scheduling group and for different days.
Meeting pattern	A single period or series of periods when a class can meet. When you schedule classes, classes are given one or more meeting patterns. Meeting patterns are also used to set up tracks.

Once you understand the terminology, the next step is to understand the interrelation between grades, homerooms, classes, and subjects in an elementary school.

- You must assign all students in your school to a homeroom. A student’s current grade level must match a grade level assigned to their homeroom.
- You can choose to automatically assign subjects to a student, based on their grade level. As a result, all students in that grade receive instruction for the core subjects associated with the grade, such as Language Arts, Math, and Social Studies. A subject can be taught either in the homeroom or in a different room. For example, multiple homerooms in a grade can be scheduled to take Grade 5 PE together, which is taught in the Gymnasium.
- You can automatically assign students to classes based on their homeroom. For example, you can designate Social Studies 4 as a subject whose classes correspond to specific homerooms. As a result, students in Homeroom 4-A are automatically assigned to the Social Studies 4 (4-A) class.
- You can create classes to accommodate the number of students in a grade who are taking a subject. For example, if there are ninety students in Grade 3 who are taking Computer Applications and you want to limit the class size to fifteen students, you can create six classes.
- Students automatically receive a schedule of most of their core and specialty subjects (also known as non-academic subjects), based on the homeroom and grade assignment. You can then make adjustments to class rosters to accommodate exceptions, such as team teaching.
- If you want to track instructional minutes, you can assign scheduling groups, define day patterns, bell schedules, and meeting patterns, and then assign meeting patterns to specific classes. You can then create a custom report to show instructional minutes for those classes.

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## Using the Planning Schedule to Schedule the Next School Year

If you are working in a planning calendar, you set up scheduling elements and schedule students in a planning schedule. In elementary scheduling, the planning calendar always has one and only one planning schedule. You cannot delete the planning schedule, nor can you have more than one schedule in the planning calendar. For more information about planning calendars, see “Creating a Planning Calendar” in the Chancery SMS School Setup Guide.

- When you create a planning calendar, a new planning schedule is automatically created.
- You can make a copy of the active calendar schedule to be the planning schedule. This copies the schedule in the active calendar and overwrites the existing planning schedule, with the following characteristics:
  - Only the fields that are available in the planning calendar are copied from the active calendar.
  - All the fields that are available in the planning calendar are copied from the active calendar, that is, you cannot choose which scheduling elements or fields to copy to the planning calendar.

### NOTE

Subjects are not copied from the school active calendar to the school planning calendar. Subjects are assigned to schools by the district. The Subject Framework must be published to schools for each calendar year.

- You can discard the changes you’ve made and create a new planning schedule, which overwrites the existing planning schedule. You can then build the planning schedule from scratch.

## Creating Planning Schedules

The planning calendar always has one and only one planning schedule. You cannot delete the planning schedule, nor can you have more than one planning schedule. Once you create a planning calendar, a planning schedule is automatically created. If you want to copy scheduling elements from the active calendar or discard changes made to a planning schedule and build the planning schedule from an empty schedule, you can create a planning schedule.

### To create a planning schedule:

- 1** Log on as a school administrator.
- 2** Make sure you are using a planning calendar.
- 3** In the control bar, under Admin, click Scheduling.
- 4** On the Scheduling page, from the Actions menu, click Create Schedule > New.

OR

On the Scheduling page, from the Actions menu, click Create Schedule > Copy from active calendar.

The following table shows how fields and data behave depending on how you create the planning schedule:

	<b>New Planning Schedule</b>	<b>Copy from Active Calendar When Subjects Are Assigned in Both Active and Planning Calendars</b>	<b>Copy from Active Calendar When Subjects Are Assigned Only in Planning Calendar</b>
<b>Staff List</b>	Same as in active calendar; changes in one calendar apply to both calendars		
<b>Room Setup</b>			
<b>Scheduling Group</b>	Two default scheduling groups: Homerooms and Classes	Copied from active calendar	Two default scheduling groups: Homerooms and Classes
<b>Day Patterns</b>	5 Regular Days and 0 Special Days	Copied from active calendar	5 Regular Days and 0 Special Days
<b>Bell Schedules</b>	None	Copied from active calendar	None
<b>Meeting Patterns</b>	None	Copied from active calendar	None
<b>Scheduling Defaults</b>	Default Scheduling Group for homerooms is Homeroom Default Scheduling Group for classes is Classes	Copied from active calendar	Default Scheduling Group for homerooms is Homeroom Default Scheduling Group for classes is Classes
<b>Class Setup</b>	None	Copied from active calendar	None
<b>Can Schedule flag</b>	Cleared	Copied from active calendar	Cleared
<b>Automatically assign this subject to all students in grade x</b>	Yes	Students are assigned in the same way as the active calendar, that is, based on settings on the Edit Subject page and whether homerooms have been created	Yes
<b>Default Teacher</b>	Homeroom Teacher	Copied from active calendar	Homeroom Teacher
<b>Number of Rosters</b>	One Roster per Homeroom	Copied from active calendar	One Roster per Homeroom

# Setting Up Basic Scheduling Elements

Basic scheduling elements include staff, rooms, and subjects. Although these elements are generally set up before you begin scheduling, you may want to verify that they are correct and make modifications, as necessary.

## Checking Staff Lists

Before you begin scheduling classes, check that the staff list for your school is correct.

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 1, click Staff List.
- 4 On the Staff Search page, search for specific teachers or click Display All Records.

The screenshot shows the 'Staff Search' interface. At the top, there is a navigation bar with 'Scheduling > Staff Search', 'Actions', 'Edit', 'Help', 'Home', and 'Log Off'. Below this is a 'Staff Search' section with two tabs: 'Basic' and 'Detail'. Under 'Basic', there are three search criteria: 'Last name' (starts with 'c'), 'First name' (starts with), and 'Staff ID' (starts with). A 'Search' button is to the right. Below the search criteria is a 'List:' dropdown menu showing 'Last name starts with "c"'. A 'Display All Records' link is circled in red and has an arrow pointing to it. Below the search section is a 'Staff Search Results' section. It shows 'Selected: 0' and 'Total: 3'. A table lists the results:

<input type="checkbox"/>	Staff name	School start date	Staff ID	User ID	Home school
<input type="checkbox"/>	<a href="#">Calaway, Jerrod</a>	6/1/2003	T-5012	5012	Anderson Elementary School
<input type="checkbox"/>	<a href="#">Carriere, Jen</a>	8/4/2003	T-5020	5020	
<input type="checkbox"/>	<a href="#">Coverdale, Myrtle</a>	8/4/2003	T-5022	5022	

To see a list of all teachers, click Display All Records.

To display the Staff Demographic page for a teacher, click the teacher's name.

## Adding Teachers

If you need to add teachers to the staff list, use the following general procedure. For more information about setting up the staff list, see "Staff" in the Chancery SMS School Setup Guide.

### NOTE

If your school uses Active Directory, see the Chancery SMS Active Directory Integration Guide for more information about working with roles, accounts, and staff records.

- Ensure the school has a Teacher role.

- For each teacher who will use Chancery SMS:
  - Create a user account for the teacher.
  - Assign the user account a Teacher role at the school.

For information about creating user roles and accounts, see “Controlling User Access” in the Chancery SMS School Setup Guide.

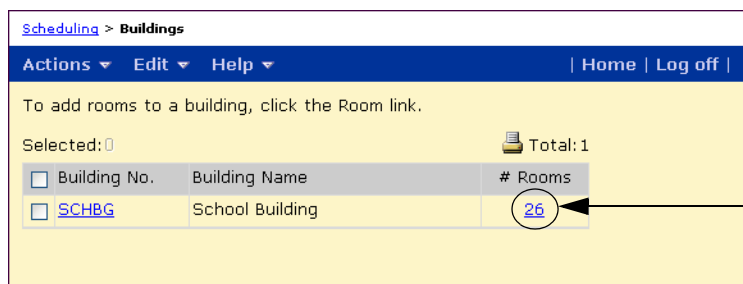
- Create a staff record for every teacher at the school.

## Setting Up Rooms

Typically, rooms are set up when you set up your school. Before you begin scheduling subjects and classes, make sure rooms are set up correctly. You can open the Room Setup page from the Scheduling page.

### To open the buildings page from the scheduling page:

- 1 Log on as a school administrator.
- 2 In the control bar under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 1, click Room Setup.
- 4 On the Buildings page, click the number in the # Rooms column.



To open the Rooms page, click the number in the # Rooms column.

- 5 On the Rooms page, do one of the following:

To	Do this
Add a room	<ul style="list-style-type: none"> <li>• From the Actions menu, click Add Room.</li> </ul>
Edit a room	<ul style="list-style-type: none"> <li>• Select a room. From the Actions menu, click Edit Room.</li> </ul> <p>OR</p> <p>In the Room No. column, click the room number.</p>
Delete a room	<ol style="list-style-type: none"> <li>1 Select the room.</li> <li>2 From the Actions menu, click Delete Room.</li> </ol> <p>Skip the remaining steps.</p> <p><b>NOTE</b> You cannot delete rooms that are assigned to classes.</p>

- 6 On the Add Room or Edit Room page, enter or edit the information about the room.  
For more information, see “Setting Up Buildings and Rooms” in the Chancery SMS School Setup Guide.



## Reviewing the Subject Framework

The subject framework, with all the subjects and subject elements, is set up at the district. Your school is assigned a subject framework containing the subjects applicable to your school.

If there are problems with your subject framework or subjects, contact your district administrator.

### To display the subject framework:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click School Setup, and then click Subject Framework.

OR

In the control bar, under Admin, click Scheduling, and then click Subject Framework.

The Subject Framework page lists the core and specialty generic subjects taught in your school, along with the associated subject elements.

"Y" indicates the grades in which a subject is taught.

Click a "Y" to edit a subject, such as Language Arts 5, along with the specific subject elements associated with the selected grade.

To display subject details, click the generic subject name.

These are Subject Elements associated with the Mathematics generic subject.

Generic Subject Name	K	1	2	3	4	5	6	8
<input type="checkbox"/> Language Arts		Y	Y	Y	Y	Y	Y	Y
Reading		Y	Y	Y	Y	Y	Y	Y
Spelling		Y	Y	Y				
Grammar		Y	Y	Y	Y	Y	Y	Y
Writing			Y	Y	Y	Y	Y	Y
Comprehension				Y	Y	Y	Y	Y
<input type="checkbox"/> Mathematics		Y	Y	Y	Y	Y	Y	Y
Operations		Y	Y	Y	Y			
Problem Solving				Y	Y	Y	Y	Y
Geometry					Y	Y	Y	Y
Shapes		Y	Y	Y				
Algebra							Y	Y
<input type="checkbox"/> Science		Y	Y	Y	Y	Y	Y	Y
Plants & Animals		Y	Y	Y	Y			
Planets		Y	Y					

**3** On the Subject Framework page, do any of the following:

<b>To</b>	<b>Do this</b>
Display subject details	<ul style="list-style-type: none"> <li>Click the Generic Subject Name.</li> </ul>
Modify subject scheduling	<ul style="list-style-type: none"> <li>In the grade column, click the "Y" in the row for the subject you want to modify. For example, to modify the scheduling setup for grade 5 language arts, in the Language Arts row, click the "Y" in the Grade 5 column.</li> </ul> <p><b>NOTE</b> Subject scheduling is set up later in the scheduling process, for more information, see "Scheduling Subjects" on page 62.</p>
Specify which grades a generic subject is taught in	<ol style="list-style-type: none"> <li>Select the generic subject.</li> <li>From the Actions menu, click Schedule / Unschedule Generic Subject.</li> </ol> <p><b>NOTE</b> If a student has been manually added to or removed from a class for the subject, you cannot remove the subject from the grade.</p>

# Setting Up the Scheduling Structure

Chancery SMS allows you to set up scheduling structures to describe the days and times that homerooms and classes meet. If you set up meeting times, you can view student, teacher, and room schedules in a matrix format, search for classes according to their meeting time, and create custom reports to calculate the minutes of instruction students are scheduled to receive. For more information about creating custom reports, see the Chancery SMS Report Writer Guide.

In elementary school scheduling, a schedule structure is not required. Scheduled classes are particularly useful in the following two scheduling models:

- Self-contained homerooms

In this scheduling model, most classes are taught by the homeroom teacher and these classes are not assigned a specific instructional time. The teacher has flexibility for when and how they teach the subjects. Certain classes, such as Music and Physical Education, may be taught by a different teacher in a different room. These classes are assigned specific instructional times (meeting patterns).

- Fully-scheduled, discrete classes

In this scheduling model, most classes are still taught by the homeroom teacher, but every class is assigned a specific instructional time (meeting pattern). Some classes are still taught by a different teacher in a different room, and these classes are part of the fully-scheduled day for each student and teacher.

## NOTE

The scheduling structure can affect data mapping. For an overview of data mapping constraints, see “Data Mapping Constraints for Scheduling” on page 13. In addition, constraints related to specific features are mentioned in the procedures for setting up those features.

## Defining Scheduling Groups

Scheduling Groups are used to group different types of classes that meet in different ways. Each Scheduling Group can have its own distinct set of bell schedules and meeting patterns. For example, you can create a homeroom bell schedule with only A.M. and P.M. blocks and a class bell schedule that covers a six period day.

Chancery SMS includes two default scheduling groups, one for homerooms and one for classrooms. You can modify or delete these default groups, as well as add scheduling groups to meet your school’s needs.

## NOTE

For data mapping, the bell schedule must be the same in all scheduling groups, that is, the period codes and period start and end times must be the same. You can create different meeting patterns based on the bell schedules to accommodate different class types.

### To set up scheduling groups:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 2, click Scheduling Groups.

- 4 On the Scheduling Groups page, do one of the following:

To	Do this
Add a scheduling group	<ul style="list-style-type: none"> <li>From the Actions menu, click Add Group.</li> </ul>
Edit a scheduling group	<ul style="list-style-type: none"> <li>Click the name of the scheduling group you want to edit. OR Select the scheduling group you want to edit. From the Actions menu, click Edit Groups.</li> </ul>
Delete a scheduling group	<p>Deleting scheduling groups also deletes its bell schedules and meeting patterns.</p> <p>You cannot delete a scheduling group that is specified as a default scheduling group or is assigned to any classes. For more information about editing default scheduling groups, see "Editing Scheduling Group Defaults" on page 28.</p> <ol style="list-style-type: none"> <li>Select the scheduling group you want to delete.</li> <li>From the Actions menu, click Delete Group.</li> <li>Click OK and skip the remaining steps.</li> </ol>

- 5 On the Edit Group page, enter or edit the following information as needed:

Field	Description
Name	Enter a unique scheduling group name.
Code	Enter a short code of up to two characters. Use meaningful short codes so you know what they mean when displayed on other pages.
Description	Enter a description of up to 250 characters. (optional)

- 6 Click OK.

## Editing Scheduling Group Defaults

When you create a homeroom or class, Chancery SMS automatically assigns it to a scheduling group. By default, Chancery SMS assigns homerooms to the homeroom scheduling group and classes to the classes scheduling group. You can change the scheduling groups assigned automatically. For example, you may want to use the same scheduling group for both homerooms and classes.

### NOTE

When you change the scheduling group defaults, the change applies only to new classes or homerooms. The scheduling groups assigned to existing classes and homerooms do not change.

### To change the scheduling group defaults:

- Log on as a school administrator.
- In the control bar, under Admin, click Scheduling.
- On the Scheduling page, under Step 2, click Scheduling Defaults.
- From the For Homerooms dropdown, select the scheduling group you want to be assigned to new homerooms.

- 5 From the For Classes dropdown, select the scheduling group you want to be assigned to new classes.
- 6 Click OK.

## Specifying Day Patterns

A day pattern is the cycle of days that your school operates on. For example, your school can use a day-of-the-week pattern using Monday to Friday or it can use a relative-day pattern using a set number of days in a cycle, such as day 1 to day 4 in a four-day relative cycle. The day pattern is used to define which classes are offered on which days.

You can also set up special days when your school has a different bell schedule, such as days when your school has parent-teacher interviews, professional development days, and so on.

### NOTE

For data mapping, special days are not supported. Use the same bell schedule for all days. You can create different meeting patterns based on the bell schedule to accommodate different class types.

Using special days allows you to have a short relative-day cycle, while still accommodating special days that have a different schedule. For example, if you use a four-day relative cycle, but have an early dismissal day once a month, you can schedule a special day once a month on your calendar, instead of using a 30-day relative cycle with a different schedule every 30<sup>th</sup> day.

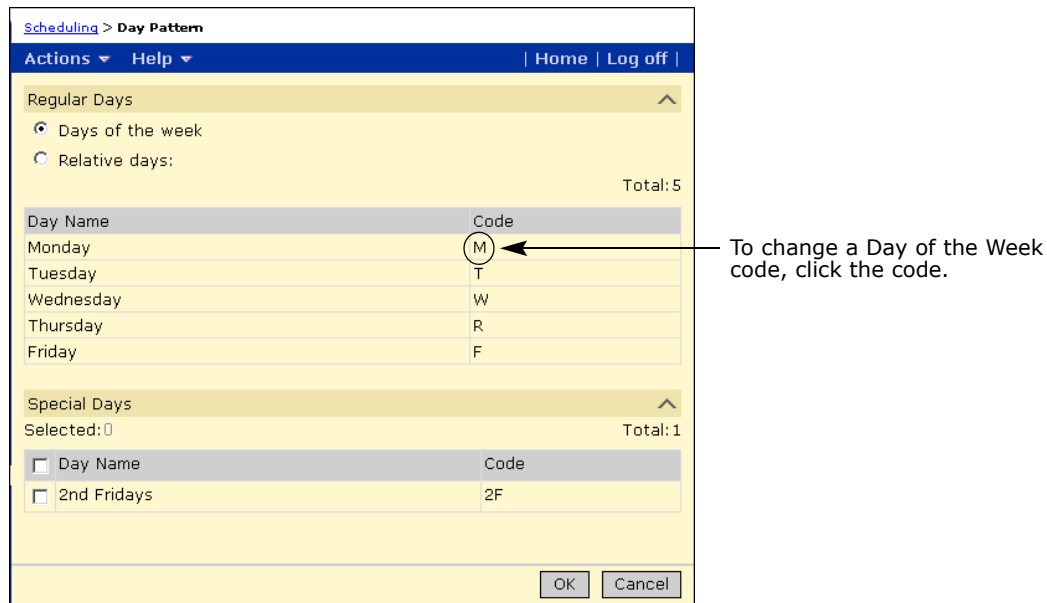
You can apply a relative day pattern to a specific date and have Chancery SMS begin using that relative day on that date. For example, if the school was unexpectedly closed due to heavy snow on Day 2, you can apply Day 2 to the following day. For more information, see "Applying Relative Day Patterns" on page 31.

### To set up a regular-day pattern or a special-day pattern:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.

- 3 On the Scheduling page, under Step 2, click Day Pattern.

The Day Pattern page displays the regular and special days set up for the day pattern.



- 4 On the Day Pattern page, in the Regular Days section, enter information about your school’s regular day pattern.

Field	Description
Days of the Week	<p>If your school schedule uses days of the week as its day pattern, select Days of the Week. Your school schedule would then follow a Monday-to-Friday pattern.</p> <p>If your school schedules classes on Saturdays or Sundays, make sure these days are set up as normal schools days in the Day Types setup list. For more information, see “Adding Day Type Codes” in the Chancery SMS School Setup Guide.</p>
Relative Days	<p>If your school schedule uses relative days as its day pattern, select this option. Your school schedule would then follow a relative day pattern, such as Day 1 to Day 4.</p> <p>You must create the number of relative days and specify their day names and short codes. For example, you can set up a four-day relative cycle called Day A to Day D, or an eight-day cycle called Day 1 to Day 8.</p> <p>To add relative days, from the Actions menu, click Add Regular Day.</p> <p>Once you have created a relative day pattern and are working in the active calendar, you can apply the relative day patterns to specific dates in the school calendar. For more information about applying relative day patterns, see “Applying Relative Day Patterns” on page 31.</p>

Field	Description
Day Name	If you are using Relative days, specify a day name for each day. To add more than five regular days, from the Actions menu, click Add Regular Days. If you are using Days of the Week, you can only change the code names for the days of the week.
Code	Enter a short code for each day name. Use meaningful short codes so you know what they mean when displayed on other pages.

- 5 On the Day Pattern page, in the Special Days section, specify the pattern for special days. To add more than two special days, from the Actions menu, click Add Special Days.

Field	Description
Day Name	Enter a Day name for each special day, for example, Early Dismiss or PTI.
Code	Enter a short code for each day name. Use meaningful short codes so you know what they mean when displayed on other pages.

- 6 Click OK

### To delete days in a relative-day pattern:

You can only delete regular days if you are using a relative-day pattern.

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 2, click Day Pattern.
- 4 Select a regular day. From the Actions menu, click Delete Regular Day.  
OR  
Select a special day. From the Actions menu, click Delete Special Day.
- 5 Click OK.

## Applying Relative Day Patterns

You must complete this step in the active calendar.

If you are using relative day patterns, you must specify the date that the relative day pattern cycle begins. Throughout the school year, you can adjust the relative day pattern cycle, as required. For example, if the school was unexpectedly closed due to heavy snow on Day 2, you can apply Day 2 to the following day.

Although you typically set up relative day patterns in a planning calendar when you schedule classes, you must apply the relative day pattern to a specific date in the active calendar.

### NOTE

You can only apply a relative day pattern if you set up scheduling to use relative day patterns. For more information about setting up relative day patterns, see “Specifying Day Patterns” on page 29.

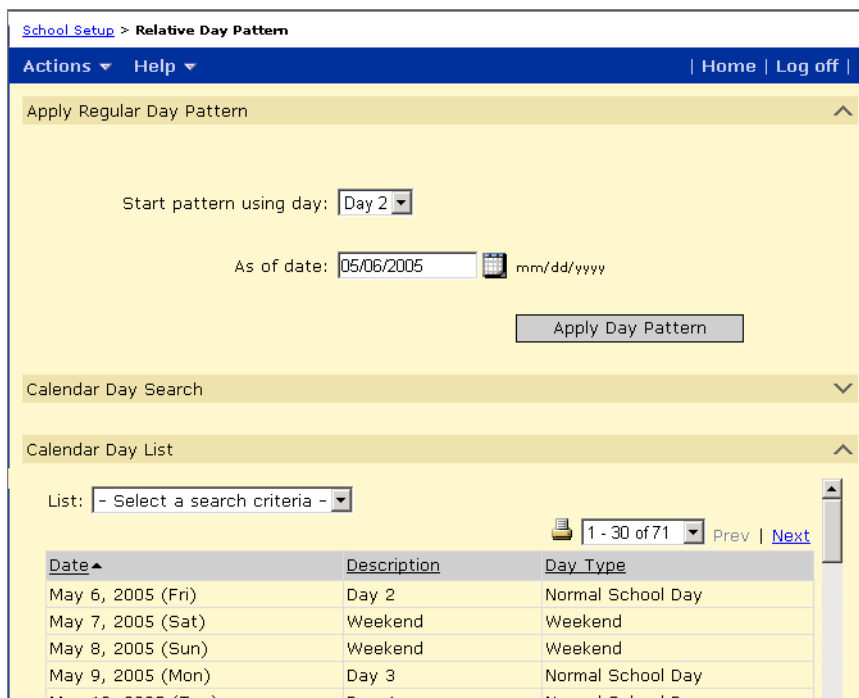
You can apply a relative day pattern at any time. You cannot apply a relative day pattern to the past (days before today) if attendance has already been taken for those days. If you apply a relative day pattern to a future date and attendance has already been taken for those future dates, the attendance for those future dates is deleted.

**NOTE**

If your district uses the Chancery SMS student behavior feature, student behavior actions assigned to students might assign attendance codes for those students. When you change relative days, all future attendance is deleted, including attendance codes assigned by student behavior actions. However, student behavior attendance codes are reassigned on a day-by-day basis when the day is initialized.

**To apply a day pattern:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click School Setup.
- 3 On the School Setup page, under Calendar, click Relative Day Pattern.  
The Relative Day Pattern page opens.



- 4 On the Relative Day Pattern page, from the "Start Pattern Using Day" dropdown, select the relative day that you want to apply to the specified date.
- 5 From the As of Date dropdown, select the date you want the relative day pattern to begin.
- 6 Click Apply Day Pattern.  
The Calendar Day List section refreshes to show your changes.



---

## Setting Up Bell Schedules

Bell schedules specify the start and end times for periods throughout the day. You can define a different bell schedule for each scheduling group and for each day in the day pattern. For example, you can have one bell schedule for the homerooms scheduling group and a different bell schedule for the classes scheduling group.

### NOTE

To support data mapping, note the following:

- Each day in the day pattern must have the same bell schedule/period structure, including the same periods and the same number of instructional minutes in periods with the same code. For example, if on Monday, period 1 had 50 instructional minutes, period 1 must have 50 instructional minutes for every day in the day pattern. Periods within one day can have different amounts of instructional minutes.
- Each day in the day pattern can have a maximum of 42 periods.
- Periods cannot overlap.
- If more than one scheduling group is defined (e.g., to support exception days), the bell schedule must be the same in both scheduling groups, that is, the period codes and period start and end times must be the same.

To set up a bell schedule, add periods to the day and define the start and end times for each period.

## Setting Up Bell Schedule Periods

You set up a bell schedule by adding periods to each day. You can set up the periods for one day and then copy those periods to other days in the bell schedule. To copy the periods from one day to other days, see “Copying Periods from One Day to Another Day” on page 36.

After you set up periods for all days for a scheduling group, you can copy the bell schedule for all the days to other scheduling groups. To copy the periods for all days in one scheduling group to another, see “Copying Periods in All Days to Another Scheduling Group” on page 38.

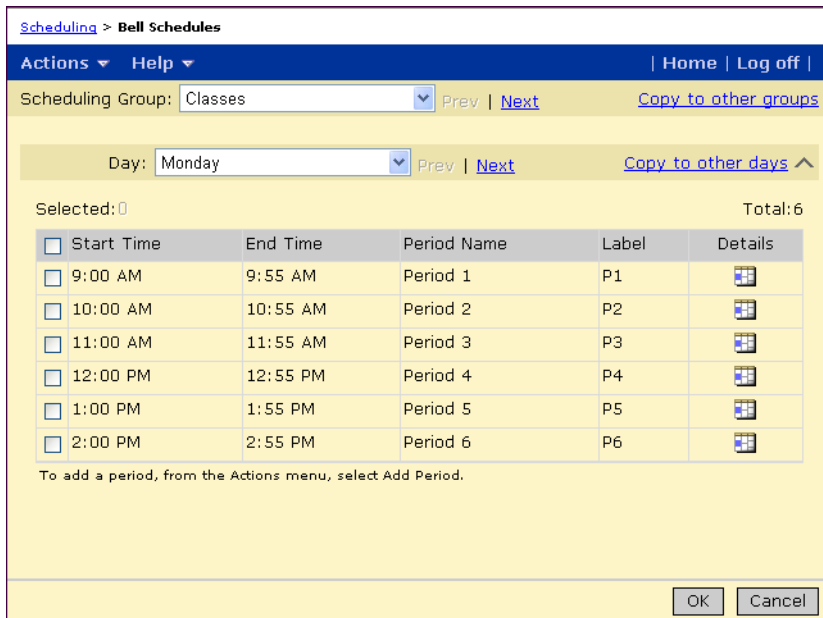
### NOTE

If you are making adjustments to an existing scheduling structure, use caution when copying periods or bell schedules to other days or scheduling groups. Copying deletes any existing setup in the target day or scheduling group, which may affect daily code calculation rules, meeting patterns, or exception day types.


### To set up periods in a bell schedule:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.

- 3 On the Scheduling page, under Step 2, click Bell Schedules.  
The Bell Schedule page displays the current bell schedule configuration.



- 4 From the Scheduling Group dropdown, select the scheduling group you want to work with.
- 5 From the Day dropdown, select the regular day or the special day you want to define.
- 6 Do one of the following:

To	Do this
Add a period	<ul style="list-style-type: none"> <li>• In the Actions menu, click Add Period.</li> </ul>
Edit a period	<ul style="list-style-type: none"> <li>• Select a period. From the Actions menu, click Edit Period.</li> <li>OR</li> <li>Click the Details icon (  ) for the period you want to edit.</li> </ul>
Delete a period	<ol style="list-style-type: none"> <li>1 Select the period.</li> <li>2 From the Actions menu, click Delete Period.</li> </ol> <p>Skip the remaining steps.</p>

If you add or edit a period, the Add Period or Edit Period page opens.

**NOTE**

If your district runs data mapping, the maximum number of periods (number of meeting blocks for each day) you can create is 42. Periods cannot overlap and each day in the day pattern must have the same bell schedule/period structure, including the same periods and the same number of instructional minutes in periods with the same code.

- 7** On the Add Period or Edit Period page, specify or edit the following information for the period:

<b>Field</b>	<b>Description</b>
Start Time	Enter the start time for the period. The start time can be several minutes after the previous end time to allow students to get to their next class.
End Time	Enter the end time for the period.
Period Name	Enter a name for the period.
Period Label (short code)	Enter a short code for the period.
Print on Schedules	If checked, this period is displayed on student or teacher schedules. If you do not want to display this period, such as for before or after school periods, deselect this checkbox.
Use for Classes	If checked, this period is available for meeting patterns to schedule classes.
Include in Daily Attendance Code Calculation Rules	This option only applies if attendance is taken by class. Currently, schools using elementary school scheduling cannot take attendance by class.
Include in Instructional/ Attendance Minutes Calculations	Select this option if you want this period included in instructional or attendance minutes calculations. For more information about instructional minutes calculations, see the Chancery SMS Instructional Minutes Calculation Technical Bulletin.  <b>NOTE</b> You cannot change this value if the period is part of a meeting pattern and attendance has been taken for a class using that meeting pattern.
This Period is Part of Regular School Hours	Select this option if you want the period to be included in instructional minutes calculations as regular school hours. For example, if your school offers academic programs in the evenings or on weekends and you want them included when you calculate instructional minutes for regular school hours.  <b>NOTE</b> If you want a period to be included in regular school hours for some classes, but not others, create two scheduling groups. Select “This period is part of regular school hours” in one scheduling group and deselect it in the other. Then schedule classes using the appropriate scheduling group.

Field	Description
For This Period Only	<p>Enter the amount of instruction time in the period.</p> <p>The instruction time is usually the number of minutes between the start and end time. For example, if a period starts at 9:00 and ends at 9:50, the instruction time is usually 50 minutes. If you leave this field blank, the result of this calculation is used when you click OK.</p> <p>There may be periods where the instruction time is less than the meeting time. For example, if a gym class meets for 65 minutes but there is 10 minutes for changing then enter 55 as the instruction time.</p> <p><b>NOTE</b></p> <p>For data mapping, the instructional minutes for periods with the same code must be the same for all days in the day pattern and in all scheduling groups. For example, if period 1 is assigned 50 instructional minutes on Monday, period 1 must have 50 instructional minutes for all the other days of the week and in all scheduling groups.</p>
Passing Time Minutes to Include for Blocked Classes	<p>Use this when a class spans more than one period and there is non-scheduled time between periods, such as time between classes for students to get to the next class.</p> <p>For example, if your schedule has four minutes between classes for students to go to the next class, and a chemistry class spans two periods, you can specify whether that four minutes is instruction time or not.</p> <p>Using this example, if your two-period Chemistry class totals 70 minutes and includes one period in the classroom and one period in the lab, with students using the four minutes between periods to go from the classroom to the lab then you would enter 66 in the "For this period only" field, and 4 in the "Passing time minutes to include for blocked classes" field.</p> <p>However, if the two-period chemistry class is both in the lab then the four minutes would be considered instruction time and you would enter 70 in the "For this period only" field and 0 in the "Passing time minutes to include for blocked classes" field.</p>

**8** Click OK.

The Bell Schedule page displays the periods defined for the day. To view details about a period, pause your mouse over the Details icon (🔍) in the Details column.

**9** To add more periods, repeat Steps 6 to 8.

## Copying Periods from One Day to Another Day

After you set up the periods for one day, you can copy them to other days so you don't have to set up the same periods for every day in the day pattern. If other days have a similar bell schedule, you can copy the periods, and then change the days that are different.

After you copy periods, making changes to the periods in one day does not affect the periods in the other day.

**NOTE**

When you copy periods to another day, any periods already defined in that day are overwritten. If you are making adjustments to an existing day, use caution when copying periods to other days. Changing the periods set up for an existing day may affect daily code calculation rules, meeting patterns, or exception day types.

**To copy periods:**

- 1 Log on as a school administrator.
- 2 In the control bar, click Scheduling.
- 3 On the Scheduling page, under Step 2, click Bell Schedules.
- 4 On the Bell Schedules page, after you define periods for one day, click "Copy to Other Days" beside the Day dropdown.

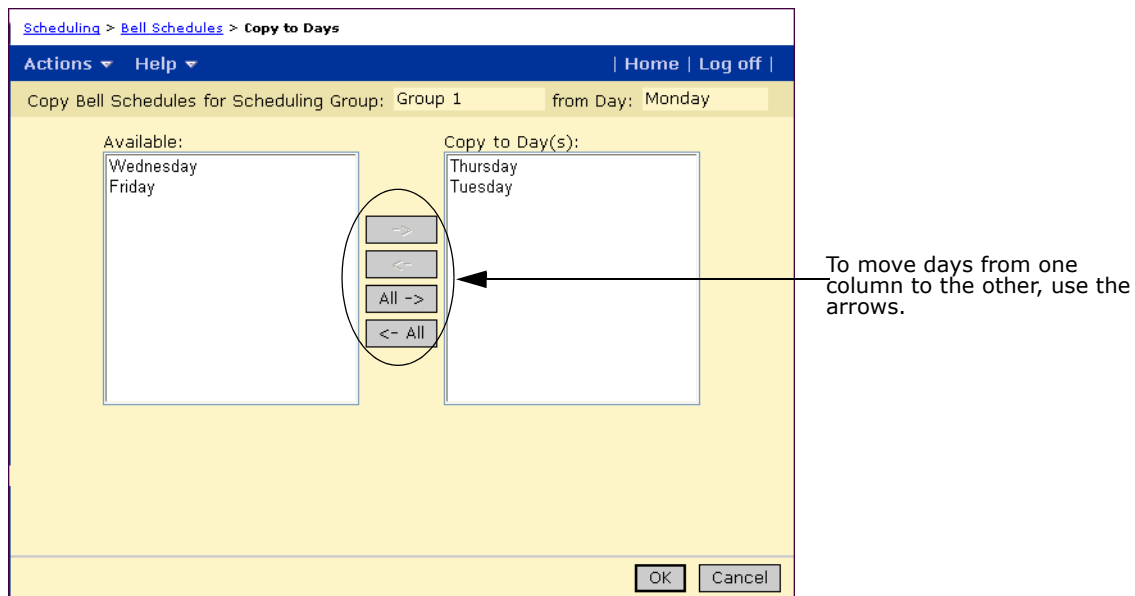
For information about adding periods, see "Setting Up Bell Schedule Periods" on page 33.

The screenshot shows the 'Bell Schedules' interface. At the top, there is a navigation bar with 'Scheduling > Bell Schedules', 'Actions', and 'Help'. Below this, there is a 'Scheduling Group' dropdown set to 'Classes' and a 'Day' dropdown set to 'Monday'. A 'Copy to other days' button is circled in red. Below the dropdowns is a table with columns: Start Time, End Time, Period Name, Label, and Details. The table contains six rows of periods. At the bottom of the interface are 'OK' and 'Cancel' buttons.

Start Time	End Time	Period Name	Label	Details
9:00 AM	10:00 AM	Period 1	P1	
10:00 AM	11:00 AM	Period 2	P2	
11:00 AM	12:00 PM	Period 3	P3	
12:00 PM	1:00 PM	Lunch	L	
1:00 PM	2:00 PM	Period 4	P4	
2:00 PM	3:00 PM	Period 5	P5	

To copy a period to another day of the week, select the period and then click Copy to Other Days.

- 5 On the Copy to Days page, from the Available column, select the days you want to copy and move them to the Copy to Days column.



- 6 Click OK. Click OK to confirm.

## Copying Periods in All Days to Another Scheduling Group

After you set up periods for all days for a scheduling group, you can copy the bell schedule for all the days to other scheduling groups. This option makes it easy to set up the bell schedules for all your scheduling groups.

### NOTE

When you copy to another scheduling group, the bell schedule in the receiving scheduling group is overwritten. If you are making adjustments to an existing bell schedule, use caution when copying to other scheduling groups. Changing the bell schedules set up for an existing day may affect daily code calculation rules, meeting patterns, or exception day types.

After you copy periods, making changes to the periods in one day does not affect the periods in another day.

### To copy periods in all days to another scheduling group:

- 1 Log on as a school administrator.
- 2 In the control bar, click Scheduling.
- 3 On the Scheduling page, under Step 2, click Bell Schedules.

- 4 On the Bell Schedules page, after you define periods for all days in a scheduling group, click "Copy to Other Groups". For information about adding periods, see "Setting Up Bell Schedule Periods" on page 33.

Scheduling > Bell Schedules

Actions ▾ Help ▾ | Home | Log off |

Scheduling Group: Classes ▾ Prev | Next **Copy to other groups**

Day: Monday ▾ Prev | Next Copy to other days ^

Selected: 0 Total: 6

<input type="checkbox"/>	Start Time	End Time	Period Name	Label	Details
<input type="checkbox"/>	9:00 AM	10:00 AM	Period 1	P1	
<input type="checkbox"/>	10:00 AM	11:00 AM	Period 2	P2	
<input type="checkbox"/>	11:00 AM	12:00 PM	Period 3	P3	
<input type="checkbox"/>	12:00 PM	1:00 PM	Lunch	L	
<input type="checkbox"/>	1:00 PM	2:00 PM	Period 4	P4	
<input type="checkbox"/>	2:00 PM	3:00 PM	Period 5	P5	

To add a period, from the Actions menu, select Add Period.

OK Cancel

To copy the bell schedule to another scheduling group, click Copy to Other Groups.

- 5 On the Copy to Groups page, from the Available column, select the scheduling groups you want to copy and move them to the Copy to Scheduling Groups column.
- 6 Click OK. Click OK to confirm.

## Creating Meeting Patterns

After you set up bell schedules, you can set up meeting patterns. A meeting pattern is a series of periods when a class can meet. You define a meeting pattern, and then specify the periods and days it meets.

Once all required meeting patterns are created for your school, the schedule structure setup is complete. When you set up classes, you can assign meeting patterns, as appropriate. For more information about setting up classes, see "Setting Up Classes" on page 71.

### To set up meeting patterns:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.

3 On the Scheduling page, under Step 2, click Meeting Patterns.

The screenshot shows the 'Meeting Patterns' page for the 'Classes' scheduling group. It features a table with columns for Name, Short Name, and Description. Two patterns are listed: 'MonWedFri-Period1' (MWF1) and 'TueThur-Period 1' (TR1). Below the table is a 'View of selected meeting patterns' section with an 'Update View' button and a timetable grid. The grid shows periods (P1-P5) for Monday through Friday.

Annotations:

- Meeting patterns for the scheduling group.
- To see the periods when a specific meeting pattern meets, select a meeting pattern and then click Update View.

4 On the Meeting Patterns page, enter the following information:

Field or Section	Description
Meeting Patterns for Scheduling Group	Select the scheduling group you want to work with.
Name	Displays the name of the meeting pattern.
Short Name	Displays the short name of the meeting pattern.
Description	Provides a summary of the days and periods when this meeting pattern meets.
View of selected meeting patterns	Displays a timetable grid. You can select one or more meeting patterns then click Update View to see how the meeting patterns fit in a timetable grid.
Update View	Updates the timetable grid with the selected meeting patterns. After you select or deselect meeting patterns, click Update View to update the timetable grid.

5 On the Meeting Patterns page, in Meeting Patterns for Scheduling Group, select the scheduling group you want to work with.



**6** Do one of the following:

To	Do this
Add a meeting pattern	<ul style="list-style-type: none"> <li>In the Actions menu, click Add Meeting Pattern.</li> </ul>
Edit a meeting pattern	<ul style="list-style-type: none"> <li>Select a meeting pattern. From the Actions menu, click Edit Meeting Pattern.</li> </ul> <p>OR</p> <p>Click the name of the meeting pattern you want to edit.</p>
Delete a meeting pattern	<ol style="list-style-type: none"> <li>Select the meeting pattern.</li> <li>From the Actions menu, click Delete Meeting Pattern. Skip the remaining steps.</li> </ol>

If you add or edit a meeting pattern, the Add Meeting Pattern or Edit Meeting Pattern page opens.

Shows the periods defined in the bell schedule. For more information about setting up the bell schedule, see "Setting Up Bell Schedules" on page 33.

**7** On the Add Meeting Pattern or Edit Meeting Pattern page, specify or edit the following information for the meeting pattern:

Field	Description
Meeting Pattern Name	Enter a descriptive name for this meeting pattern so that you can easily see when this meeting pattern meets.
Short Name	Enter a descriptive short name for this meeting pattern. Use meaningful short names so you know what they mean when displayed on other pages.

Field	Description
Meeting Pattern	Select the periods when this meeting pattern meets. For example, if this meeting pattern meets in period 1 on Day 2 and Day 4, select Day 2, Period 1 and Day 4, Period 1.

- 8 Click OK.

## Setting Up Meeting Patterns for Blocked Periods - Example

If your school wants to offer classes in blocked periods, create meeting patterns that use multiple, consecutive periods.

### NOTE

Do not use the Add More Detail link on the Class Setup page to create double periods by assigning multiple meeting patterns to the class.

### To create a blocked period meeting pattern:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.
- 4 If you are using a planning calendar, on the Scheduling page, under Step 3, click Meeting Patterns.  
OR  
If you are using the active calendar, on the Scheduling page, under Step 2, click Meeting Patterns.
- 5 On the Meeting Patterns page, in Meeting Patterns for Scheduling Group, select the scheduling group you want to work with.
- 6 In the Actions menu, click Add Meeting Pattern.
- 7 On the Add Meeting Pattern page, enter a name and short name for the blocked meeting pattern; for example, enter Period 1-2 and P1-2.

- 8 On the Meeting Pattern panel, select the periods to include in the blocked meeting pattern.

Scheduling > Meeting Patterns > Edit Meeting Pattern

Actions Help | Home | Log off |

Meeting Pattern for Scheduling Group: All

\*Meeting pattern name:

\*Short name:

Meeting Pattern

	M	T	W	R	F	S
7 AM						
8 AM	P1 <input checked="" type="checkbox"/>	P1 <input checked="" type="checkbox"/>	W1 <input type="checkbox"/>	T1 <input type="checkbox"/>	P1 <input checked="" type="checkbox"/>	
9 AM	P2 <input checked="" type="checkbox"/>	P2 <input checked="" type="checkbox"/>			P2 <input checked="" type="checkbox"/>	P1 <input type="checkbox"/>
10 AM	P3 <input type="checkbox"/>	P3 <input type="checkbox"/>	W2 <input type="checkbox"/>	T2 <input type="checkbox"/>	P3 <input type="checkbox"/>	
11 AM	P4 <input type="checkbox"/>	P4 <input type="checkbox"/>			P4 <input type="checkbox"/>	
12 PM	P5 <input type="checkbox"/>	P5 <input type="checkbox"/>	W3 <input type="checkbox"/>	T3 <input type="checkbox"/>	P5 <input type="checkbox"/>	
1 PM	P6 <input type="checkbox"/>	P6 <input type="checkbox"/>			P6 <input type="checkbox"/>	
2 PM	P7 <input type="checkbox"/>	P7 <input type="checkbox"/>	W4 <input type="checkbox"/>	T4 <input type="checkbox"/>	P7 <input type="checkbox"/>	
3 PM	P8 <input type="checkbox"/>	P8 <input type="checkbox"/>			P8 <input type="checkbox"/>	

\*Required

OK Cancel

Select the periods the blocked class meets in; for example, this meeting pattern offers classes in period 1 and 2 on Mondays, Tuesdays, and Fridays.

- 9 Click OK.

## Viewing Meeting Patterns

You can view a visual representation of defined meeting patterns.

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 2, click Meeting Patterns.

- On the Meeting Patterns page, select the meeting pattern you want to view.

Scheduling > Meeting Patterns

Actions Edit Help | Home | Log off |

Meeting Patterns for Scheduling Group: Homerooms Prev Next

Selected: 1 Total: 2

Name	Short Name	Description
<input checked="" type="checkbox"/> Meeting Pattern 1	MP1	M(p1), T(p1), W(p1), F(p1)
<input type="checkbox"/> Meeting Pattern 2	MP2	M(p2), T(p2), W(p2), F(p2)

To add a meeting pattern, from the Actions menu, select Add Meeting Pattern

View of selected meeting patterns

Update View

	M	T	W	F
9 AM	p1	p1	p1	p1
10 AM	p2	p2	p2	p2
11 AM				

Select the meeting patterns you want to view.

- Click Update View.

Scheduling > Meeting Patterns

Actions Edit Help | Home | Log off |

Meeting Patterns for Scheduling Group: Homerooms Prev Next

Selected: 1 Total: 2

Name	Short Name	Description
<input checked="" type="checkbox"/> Meeting Pattern 1	MP1	M(p1), T(p1), W(p1), F(p1)
<input type="checkbox"/> Meeting Pattern 2	MP2	M(p2), T(p2), W(p2), F(p2)

To add a meeting pattern, from the Actions menu, select Add Meeting Pattern

View of selected meeting patterns

Update View

	M	T	W	F
9 AM	p1 MP1	p1 MP1	p1 MP1	p1 MP1
10 AM	p2	p2	p2	p2
11 AM				

Click Update View to see a visual representation of the meeting pattern.

# Setting Up Homerooms and Subject Scheduling Rules

In elementary schools, all students are assigned to a homeroom. Typically, core classes are assigned based on the student's homeroom assignment. However, you may need to modify student schedules by assigning specialty classes, transferring students to a different classes, entering subject exceptions, or assigning resource services.

## Working with Constraints

You can use constraints to control the distribution of students in classes. Schools that use elementary scheduling can assign constraints to classes or homerooms.

For elementary schools, Chancery SMS supports Restriction constraints, which allow you to control the distribution of students in classes and homerooms. For example, you can create an all-girl physical education class.

Constraints can be created at the district or at the school. Constraints created at the district are available to all schools in the district. If you modify a district-defined constraint at a school, Chancery SMS creates a copy of the constraint at the school level. Schools cannot delete district-defined constraints. When you create or edit constraints at the school, you can also make the constraint mandatory for specific subjects and/or homerooms.

Once constraints are defined, you apply or remove the constraint for specific classes and/or for homerooms. If a constraint is mandatory for a subject or homeroom, you cannot remove it from any class for that subject or homeroom.

## Creating and Editing Constraints

Restriction constraints allow you to control the distribution of students in classes and homerooms according to specific criteria. For example, you can ensure that no more than 10 percent of the students in a class have special needs or restrict specific homerooms to students for whom English is their second language.

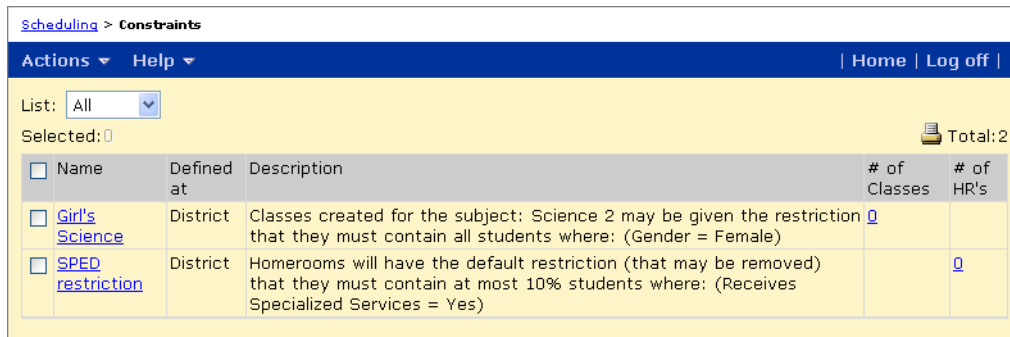
Creating and editing constraints involves three basic steps:

- Step 1: Define Constraints
- Step 2: Select Student Criteria
- Step 3: Select Subjects or Homerooms

### Step 1: Define Constraints

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.

- 3** On the Scheduling page, under Step 3, click Constraints.  
The Constraints page opens.



- 4** On the Constraints page, do one of the following:

To	Do this
Add a constraint	<ul style="list-style-type: none"> <li>From the Actions menu, click Add Constraint.</li> </ul>
Modify a constraint	<ul style="list-style-type: none"> <li>Click the constraint name.</li> </ul> <p>OR</p> <p>Select the constraint. From the Actions menu, click Edit Constraint.</p> <p><b>NOTE</b> If you modify a district-defined constraint, it is saved at the school as a school-defined constraint. The district-defined constraint is not changed and is still available at the district and at the school.</p>
Delete a constraint	<ol style="list-style-type: none"> <li>Select the constraint.</li> <li>From the Actions menu, click Delete Constraint.</li> </ol> <p>Skip the remaining steps.</p> <p><b>NOTE</b> You cannot delete district-defined constraints. You can delete school-defined constraints that are based on district-defined constraints.</p>

If you add or edit a constraint, the Add Constraint or Edit Constraint page opens.

- On the Add Constraint or Edit Constraint page, expand the Define Constraint panel and enter or edit the following information:

Field	Description
Name	Enter a name for the constraint. The name must be unique within the school. <b>NOTE</b> If you modify a district-defined constraint, a school-defined version of the constraint is saved for your school. The district-defined version is not changed and is still available to apply to classes.
Defined At	View-only. Indicates whether the constraint was created at the district or at the school.
Program Constraint	Select this checkbox if the constraint applies to the specialized activities or courses outside of regular academic studies available through Program Management. For more information about Program Management, see the Chancery SMS Program Management Guide.
Track Program Attendance for Classes with this Constraint	This checkbox is available if the Program Constraint checkbox is selected. Select this checkbox if you want Program Management to include classes that are assigned this restriction in instructional minute calculations. For more information about Program Management, see the Chancery SMS Program Management Guide.

- 6 Under "Complete the following phrase to define the constraint", enter the following information to construct the constraint statement:

Field	Description
First dropdown	<p>Select the constraint strength, that is, whether the constraint must be applied or should be applied.</p> <p>If you select "Must contain", automated scheduling processes will not schedule students if the constraint is not satisfied. When manually scheduling students that do not meet the criteria, you must have the Override Constraints permission set to "Yes" to add the student to the class.</p> <p>If you select "Should contain", automated scheduling processes attempt to meet the specified constraint criteria, but if another class or homeroom is not available, Chancery SMS will schedule students who do not match the criteria. When manually scheduling students that do not meet the criteria, Chancery SMS displays a warning but does not prevent the student from being added to the class.</p>
Second dropdown	<p>Select the constraint range from the following options:</p> <ul style="list-style-type: none"> <li>• At most - the maximum number of students that can have the specified criteria.</li> <li>• All - all students assigned to this class or homeroom must have the specified criteria. This option is equivalent to "must contain 100%".</li> <li>• No - no students assigned to this class or homeroom can have the specified criteria. This option is equivalent to "must contain 0%".</li> </ul>
Text box	<p>Enter the constraint value, that is, the number or percent of students required for the constraint.</p> <p>For percent values, enter a number between 0 and 100.</p> <p>For numeric values, enter a number between 0 and 9999.</p>
%/ #	Select whether the constraint value is a number or a percentage.
Third dropdown	Select the constraint matching criteria. Students can either match or not match the defined criteria.

- 7 Continue with "Step 2: Select Student Criteria" on page 49.

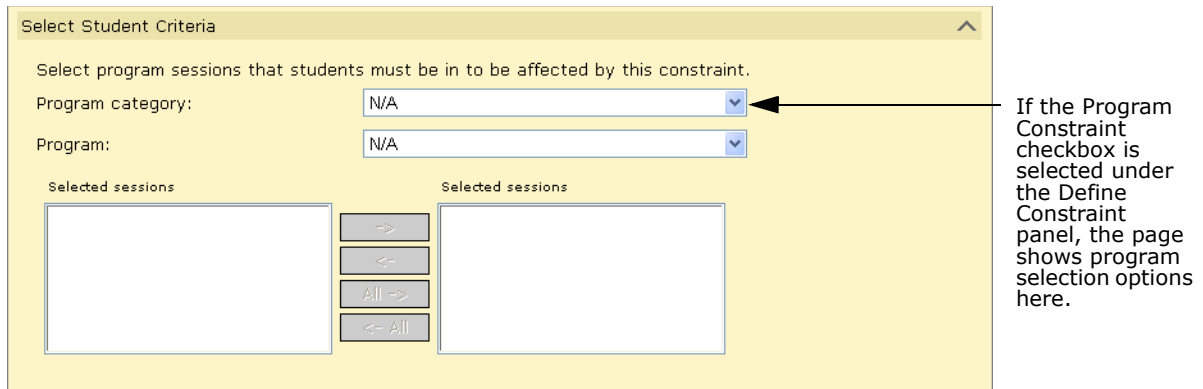


## Step 2: Select Student Criteria

After you define the constraint, you must specify the criteria that students must match to be eligible for the classes the constraint is assigned to.

### To select student criteria:

- 1 On the Add Constraint or Edit Constraint page, expand the Select Student Criteria panel.



- 2 If the Program Constraint check box is not selected under the Define Constraint panel, construct criteria statements for the eligibility rule using the eligibility control. For more information about using the eligibility control, see “Working with the Eligibility Control” on page 51.

To	Do this
Add a criteria statement to the eligibility rule	<ol style="list-style-type: none"> <li>1 From the Category dropdown, select the type of data to be added.</li> <li>2 Under Search By, from the first dropdown, select the field or function.</li> <li>3 From the second dropdown, select the appropriate operator (e.g., equals).</li> <li>4 From the third dropdown, enter or select the appropriate value.  If you selected a function in step 2, additional dropdowns are available under “Where the following conditions apply.”</li> <li>5 If available, under “Where the following conditions apply”, from the first dropdown, select the condition.</li> <li>6 If available, from the second dropdown, select the appropriate operator (e.g., equals).</li> <li>7 If available, from the third dropdown, select a value.</li> <li>8 Click Add Criteria.</li> </ol>
Delete a criteria statement from the eligibility rule	<ol style="list-style-type: none"> <li>1 In the Eligibility Criteria list box, click the statement to highlight it.</li> <li>2 Click Remove.</li> </ol>

To	Do this
Add a logical operator to define the relationships between statements	<ol style="list-style-type: none"> <li>1 Click AND or OR.</li> <li>2 Add a criteria eligibility statement to the logical operator.</li> </ol> <p><b>NOTE</b> Eligibility rules using multiple criteria must conform to the “Rule of Two”. Each operator must have a pair of items nested underneath. Item pairs can be either two criteria OR one criteria and an operator (AND/OR).</p>
Move a statement to another location in the eligibility rule	<ul style="list-style-type: none"> <li>• Click and drag the statement to the new location.</li> </ul>
Validate the rule	<ul style="list-style-type: none"> <li>• Click Validate.</li> </ul>

- 3 If Program Constraint is selected under the Define Constraint panel, specify the programs that the constraint applies to by entering the following information:

Field	Description
Program Category	Select the appropriate program category.
Program	Select the program the constraint applies to.
Available sessions/Selected sessions	<p>To assign the constraint to a session, select the session from the Available Sessions list and move it to the Selected Sessions list.</p> <p>To remove the constraint from a session, select the session from the Selected Sessions list and move it to the Available Sessions list.</p>

- 4 Continue with “Step 3: Select Subjects or Homerooms” on page 50.

### Step 3: Select Subjects or Homerooms

Once you have defined a constraint (see “Step 1: Define Constraints” on page 45) and selected student criteria (see “Step 2: Select Student Criteria” on page 49), you are ready to assign the constraint to subjects or homerooms.

When you assign constraints to a subject or homeroom, you indicate how the constraint applies to classes for that subject or homeroom. Constraints may apply by default, be available, or be mandatory for subjects and homerooms.

**To assign constraints to subjects and homerooms:**

- 1 On the Add Constraint or Edit Constraint page, expand the Selected Subjects/Homerooms panel.

- 2 To assign the constraint to subjects, select the Constraint is for Subject checkbox. In the Available Subjects list, select the subjects the constraint applies to and move them to the Selected Subjects list.
- 3 To assign the constraint to homerooms, select the Constraint is for Homerooms checkbox.
- 4 From the Constraint Is dropdown, select one of the following options:

Option	Description
Available	The constraint is available to homerooms and classes for the selected subjects. It is not automatically applied to individual classes or homerooms.
Default	The constraint is applied by default to newly created homerooms and newly created classes for the selected subjects, but can be removed for specific classes or homerooms.
Mandatory	The constraint is applied to all classes for the selected subjects and all selected homerooms. You cannot remove the constraint for the classes or homerooms.

- 5 Click OK.

**Working with the Eligibility Control**

The Eligibility control allows you to construct eligibility rules. For constraints, the eligibility rules are used to determine if students are eligible for classes based on the applied constraints.

The Eligibility control is made up of two sections:

- The statement builder – a collection of fields known as Search By sets that you can use to construct the individual criteria statements.

- The Eligibility Criteria section – a list box that contains the entire eligibility rule, including the logical operators (AND/OR) that connect the statements.

The screenshot shows the 'Statement Builder' interface. At the top, the 'Category' is set to 'Enrollment'. The 'Search By' section contains 'Student is active' equals 'True'. Below this, 'Where the following conditions apply:' includes '\*Effective date: equals Today'. An 'Add Criteria' button is visible. The 'Eligibility Criteria' section contains a list of criteria:
 

- Criteria
- AND
- OR
- AND
- Grade level equals 9
- Cumulative GPA is greater than 3.3
- AND
- Grade level equals 10
- Cumulative GPA is greater than 3.5
- Days absent unexcused is less than or equal to 1

 Buttons for 'AND', 'OR', 'Validate', and 'Remove' are present. At the bottom, a complex logical expression is displayed:
 

```
(((((Grade level equals 9 where effective date equals Today )AND(Cumulative GPA is greater than 3.3 where cumulative GPA definition equals Weighted Cum GPA ))OR((Grade level equals 10 where effective date equals Today )AND(Cumulative GPA is greater than 3.5 where cumulative GPA definition equals Weighted Cum GPA )))AND(Days absent unexcused is less than or equal to 1 where start date equals Start of District Calendar and end date equals End of District Calendar ))
```

### Using the Statement Builder

The statement builder has three sections: a Category selector, a primary Search By statement, and, for some statements, an additional set of “where” clauses. To add a statement to the eligibility criteria, click Add Criteria.

This annotated screenshot identifies the components of the Statement Builder:
 

- Category of student data:** Points to the 'Category:' dropdown menu.
- Search By statement:** Points to the 'Search By:' section, which includes 'Enrolled in district program' equals 'True'.
- Where clause (appears if function selected in Search By statement):** Points to the 'Where the following conditions apply:' section, which includes '\*Start date: equals Start of District Calendar', '\*End date: equals End of District Calendar', '\*Program category: equals Academic Enhancement', and '\*Program: equals Math Tutoring Secondary'.
- Left term, Operator, Right term:** Labels with arrows pointing to the 'Enrolled in district program', 'equals', and 'True' fields respectively.
- Add Criteria:** A button at the bottom right with an arrow pointing to it and the text 'Click to add the statement to the'.

To construct a statement, you first select a category of student data. For example, Demographics.

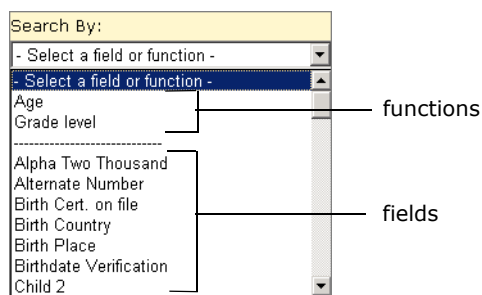
In each category, you will find all the existing properties in the database that could be relevant to calculating eligibility for that particular category.

The Search By section is made up of a left term, an operator (e.g., equals, is greater than or equal to, contains, etc.), and a right term. Using these components, you construct the main search statement to be added to the eligibility control.

**IMPORTANT NOTE**

All eligibility rule criteria open text field searches are case sensitive.

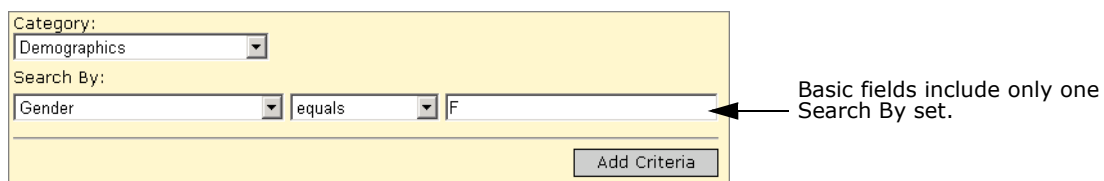
Depending on the category you select, from the left term, you can select either a field or a function.



The options available for specifying a criteria depends on whether you select a field or a function from the left term dropdown:

- **Field**

In its simplest form, a field is any single piece of data stored in the database, such as a student’s gender. When you select a basic field as the left term, you can specify an operator and right term then add the statement to the eligibility rule; no additional controls are generated.



Some fields include an additional Search By set below the first, which allows you to search for specific information related to the selected field. For example, if you select a setup list, such as Ethnicity, an additional dropdown allows you to select another left term, such as description or code, and specify an operator and right term; for example, "Ethnicity Description equals Asian".

- **Function**

A function is a predefined tool used to construct statements about complex data that require you to specify limiting or "where" clauses. For example, if you specify that a student must have a cumulative GPA of 3.5, the system will look at all cumulative GPA definitions. However, if you use a cumulative GPA function, additional Search By sets are automatically generated to allow you to select a specific GPA definition.

When you select a function, a section called "Where the following conditions apply" appears below the Search By section. Any limiting terms necessary to extract the appropriate data are preset. Once you select the operator and right term for the first Search By set and all associated where clauses, you can add the statement to the eligibility rule.

**NOTE**

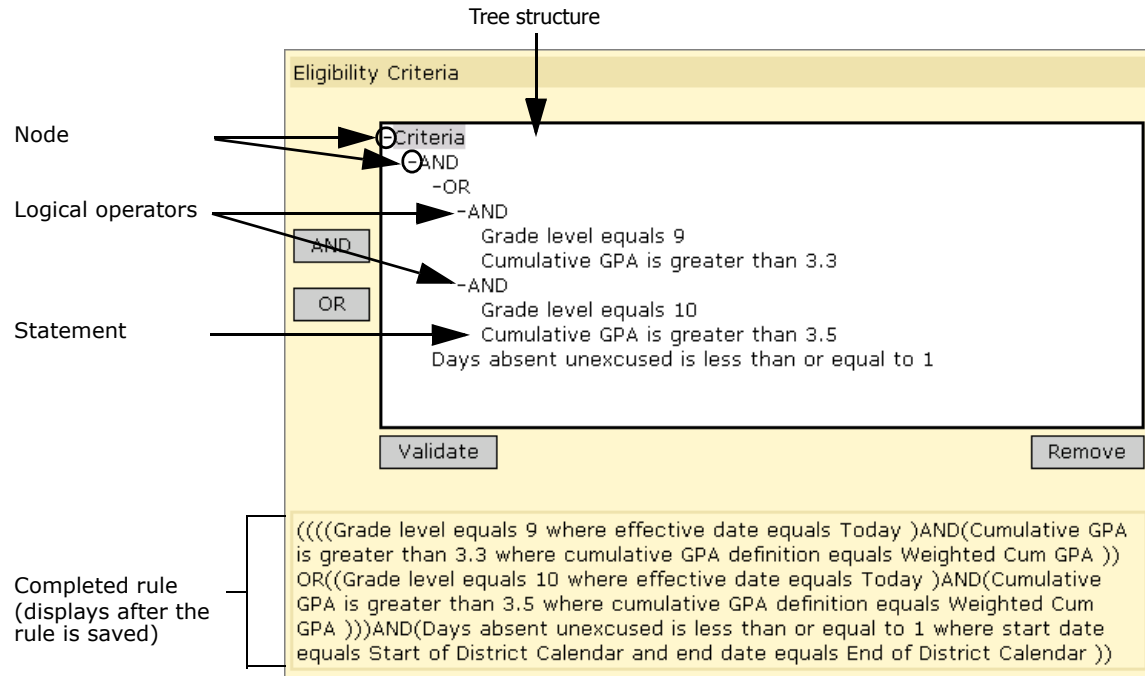
For some functions, the options available in the right term dropdown for some parameters depend on whether you are defining the rule at the district level or at the school level. If you are defining the rule at the district level, you can select from a list of values defined at any school in the district. If you are defining the rule at the school level, you only see values defined at that school. If an eligibility rule is created at the district using a value that is defined at some but not all schools, and then the rule is run at a school that does not have the value defined, no students at the school will match the criteria.

For example, suppose a district has two schools that each create a cumulative GPA definition. School A calls the definition "Weighted Cum GPA" and School B calls the definition "Weighted Cumulative GPA". Then, at the district, you create an eligibility rule. When you set the Cumulative GPA definition parameter, the list of Cumulative GPA definitions includes both "Weighted Cumulative GPA" and "Weighted Cum GPA". If you create the eligibility rule that specifies the "Weighted Cum GPA" definition, when the rule is run at School B, no students match the criteria.

For a description of the functions available for each category, see the Chancery SMS Eligibility Technical Bulletin.

## Creating Eligibility Rules

The Eligibility Criteria section of the control groups together the individual statements into an eligibility rule.



The eligibility rule as a whole is displayed in the list box in the Eligibility Criteria section. This list box is organized in a tree structure, similar to the folders on a computer, and the branches of this tree are called nodes. When you construct a statement and click Add Criteria, the statement is added below the selected node, or to the bottom of the rule if a node was not selected.

If you have more than one statement in your rule, you must add logical operators to group them meaningfully. For example, if students are required to meet all the criteria in your rule, the first node under Criteria should be AND; all the statements would then hang off that node. If, on the other hand, students are only required to meet one out of a list of criteria, the first node should be OR. Additional nodes can be added to allow a combination of these operators.

To add operators, click the node to which you want to add the operator and then click the AND or OR button. You can then drag the statements to the appropriate node. You can also drag whole nodes to different locations in the list box or remove statements completely.

### NOTE

When dragging a statement or operator, make sure the cursor is directly above the node before releasing it.

## Eligibility Rules and Null or Empty Values

When the Chancery SMS eligibility control processes eligibility rule criteria that references a field that is empty, it evaluates as false unless it uses the "is empty" operator.

For example, if the student's Date of Birth field is empty, the following criteria would evaluate as true:

age is empty

However, the following criteria would evaluate as false:

age does not equal 12

For best results, before calculating eligibility, make sure student data is complete and correct.

## Applying Constraints to Classes and Homerooms

After you set up constraints, you can apply or remove them for specific classes and/or homerooms. The constraints in the Available Constraints, Selected Constraints, and Mandatory Constraints lists depend on how constraints were assigned to subjects and/or homerooms. (See “Step 3: Select Subjects or Homerooms” on page 50).

If a constraint is available to subjects and/or homerooms, it is available to all classes for the selected subjects and/or all homerooms, but is not applied unless selected for specific classes or homerooms. If a constraint is set to default for subjects and/or homerooms, it is applied when homerooms or classes for that subject are created. You can manually remove the constraint from classes and homerooms. If the constraint is mandatory for subjects and/or homerooms, it is automatically applied to all homerooms and all classes for selected subjects and it cannot be removed.

Chancery SMS provides several methods for applying constraints to specific classes and homerooms.

- From the Apply Constraints page – allows you to work with both classes and homerooms and shows detailed information about the constraint you are working with. For more information, see “Applying Constraints Using the Apply Constraints Page” on page 56.
- From the Class Setup page – shows detailed information about classes while you assign constraints. For more information, see “Setting Up Classes by Subject” on page 75.
- From the Homeroom Details page – shows detailed information about homerooms while you assign constraints. For more information, see “Setting Up Homerooms for Scheduling” on page 59.

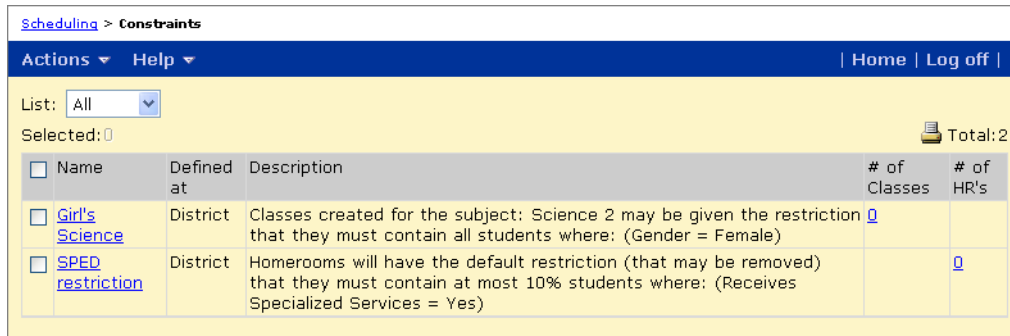
## Applying Constraints Using the Apply Constraints Page

The Apply Constraints page allows you to work with both homerooms and classes at the same time. It also shows detailed information about the constraints you are working with.

- 1 Log on as a school administrator.
- 2 In the control bar, click Scheduling.

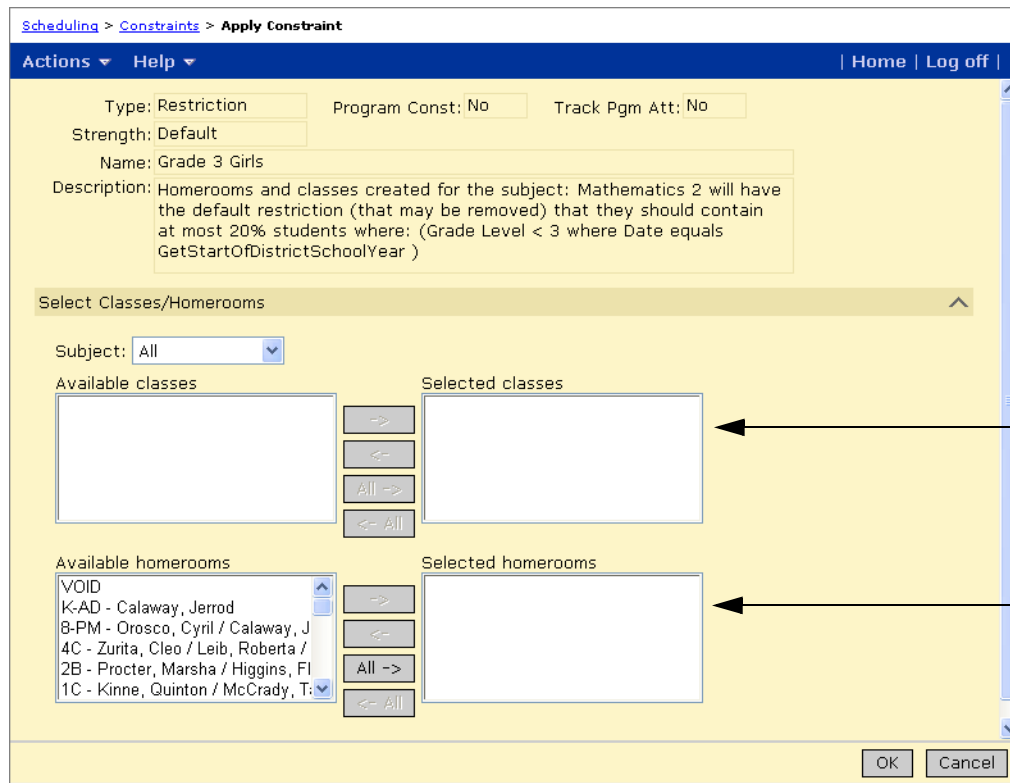


- On the Scheduling page, click Constraints.  
The Constraints page opens.



- On the Constraints page, do one of the following:
  - In the list of constraints, select the constraint you want to apply to classes or homerooms. From the Actions menu, click Apply Constraint.
  - Click the number in the # of Classes column.
  - Click the number in the # of HRs column.

The Apply Constraints page opens.



Class selector appears if constraint is available to subjects.

Homeroom selector appears if constraint is available to homerooms.

**5** On the Apply Constraints page, review the following information:

Field	Description
Type	Displays the type of constraint, i.e., Restriction.
Program Const	Indicates whether the constraint applies to the specialized activities or courses outside of regular academic studies available through Program Management. For more information about Program Management, see the Chancery SMS Program Management Guide.
Track Program Att	Indicates whether Program Management includes classes that are assigned this restriction in instructional minute calculations. For more information about Program Management, see the Chancery SMS Program Management Guide.
Strength	Indicates how the constraint is applied to subjects and homerooms. Available indicates that it is available to all classes for the selected subject or all homerooms, but is not applied unless selected for specific classes or homerooms. Default indicates that it is applied to newly created homerooms or newly created classes for selected subjects. You can manually remove the constraint from classes and homerooms. Mandatory indicates that it is automatically applied to all homerooms or all classes for that subject and it cannot be removed.
Name	Shows the name of the constraint.
Description	Shows the definition of the constraint.

**6** Under the Select Classes/Homerooms panel, do the following:

To	Do this
Assign the constraint to specific classes	<ol style="list-style-type: none"> <li>From the Subject dropdown, select the subjects you want to display. OR Select All.</li> <li>In the Available Classes list, select the classes and move them to the Selected Classes list.</li> </ol> <p><b>NOTE</b> If the constraint is mandatory for the subject, you cannot remove it from classes and the list is not available.</p>
Assign the constraint to specific homerooms	<ul style="list-style-type: none"> <li>In the Available Homerooms list, select the homerooms and move them to the Selected Homerooms list.</li> </ul> <p><b>NOTE</b> If the constraint is mandatory for the homerooms, you cannot remove it from homerooms and the list is not available.</p>

**7** Click OK.

## Setting Up Homerooms for Scheduling

You typically add homerooms when you initially set up your school. For more information about adding homerooms when you set up your school, see "Setting Up Homerooms" in the Chancery SMS School Setup Guide. Before you schedule your school for the year, verify existing homerooms and add, edit, or delete homerooms, as necessary.

In elementary school scheduling, students normally receive most of their instruction in their homeroom. In addition, attendance is taken in the homeroom.

After you schedule subjects, you can assign students to homerooms. For more information about assigning students to homerooms, see "Assigning Students to Homerooms and Classes" on page 87.

### To set up homerooms:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 3, click Homerooms.
- 4 On the Homerooms page, do one of the following:

To	Do this
Add a homeroom	<ul style="list-style-type: none"> <li>• From the Actions menu, click Add Homeroom.</li> </ul>
Edit a homeroom	<ul style="list-style-type: none"> <li>• Click the homeroom number (in the HR column) of the homeroom you want to modify.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Select the homeroom you want to modify. From the Actions menu, click Edit Homeroom.</li> </ul>
Delete a homeroom	<p>Before you delete a homeroom, make sure all students assigned to that homeroom are re-assigned to new homerooms. Also, make sure no teachers are assigned to the homeroom.</p> <ol style="list-style-type: none"> <li>1 Select the homeroom that you want to delete.</li> <li>2 From the Actions menu, click Delete Homeroom.</li> <li>3 Click OK and skip the remaining steps.</li> </ol>

- 5 On the Add Homeroom page or Edit Homeroom page, enter or edit the following information:

Field	Description
Homeroom Name	Assign a name to the homeroom, usually a number, such as 6A.
Room	Select the classroom number.
Capacity	Enter, the maximum number of students allowed in this homeroom.
Teacher	Assign a teacher for this homeroom. If applicable, assign up to two more teachers for the homeroom.
Grade	Select one or more grades. If a homeroom is for a split class, select two grades, such as Grades 2 and 3 for a Grade 2/3 split class.

Field	Description
Attendance	Indicate when attendance is taken for this homeroom. In elementary school scheduling, you can take full day or half day attendance. You cannot take class attendance; however, you can take supplementary attendance for individual classes. For more information, see the Chancery SMS School Setup Guide.
Scheduling Group	If your school uses a schedule structure, select a scheduling group. By default, homerooms are assigned to the Homeroom scheduling group. Changing the scheduling group changes the set of meeting patterns available. For more information, see "Setting Up the Scheduling Structure" on page 27.
Meeting Pattern	If you want to assign meeting times and the scheduling structure is set up, select a meeting pattern. For more information about setting up scheduling structures, see "Setting Up the Scheduling Structure" on page 27.
Default Attendance Code	Specify the attendance code to be assigned to students in this homeroom if an attendance code is not explicitly entered. For more information about attendance, see the Chancery SMS School Setup Guide.

- 6** On the Constraints panel, review the constraints assigned to the homeroom. Constraints that are available to, but not applied to the homeroom, are listed in the Available Constraints list. Constraints that are applied to the homeroom are shown in the Selected Constraints list. Constraints that are mandatory for the homeroom are shown in the Mandatory Constraints list. For more information about Homeroom constraints, see "Working with Constraints" on page 45.
- 7** To change the constraints applied to this homeroom, select the constraint in the Available Constraint or Selected Constraint list and move it to the appropriate list.

**NOTE**

Mandatory constraints cannot be removed from the homeroom.

Scheduling > Homerooms > Edit Homeroom: 1A

1A - E Ballentine...

Attendance: Full day

\*Scheduling group: Homerooms

Meeting pattern: All

Default attendance code: \*Present (Present)

The default present and absent attendance codes are indicated with an asterisk (\*).

Constraints

Available constraints:

- Girl's Science[S]
- Test Constraint[D]

Selected constraints:

- SPED Restriction[S]

Mandatory constraints:

- ESL Restriction[S]

Save+Add OK Cancel

Annotations:

- Constraints applied to this homeroom. (points to the Selected constraints list)
- Constraints available to homerooms, but not applied to this homeroom. (points to the Available constraints list)
- These constraints cannot be removed from this homeroom. (points to the Mandatory constraints list)
- Select constraints in the Available Constraints list or Selected Constraints list and click the arrows to move them between the lists. (points to the navigation arrows)

**NOTE**

The following step (Step 8) and the related fields are for Tennessee customers only.


- 8 Tennessee customers only:** In the State Reporting Panel, enter or edit the following information:

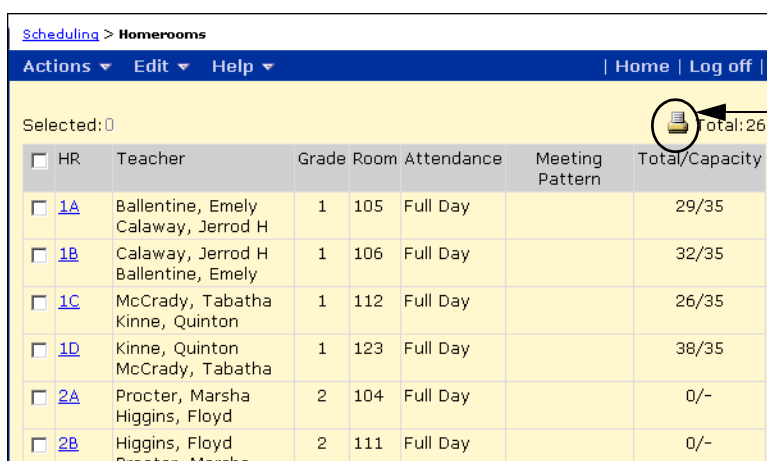
Field	Description
State Course Code	If students are scheduled into self-contained homerooms, specify a four-digit SDE Course code. If students are scheduled into fully-scheduled, discrete classes, leave this value blank for homerooms.
Track	The number assigned to the Instructional program (Track) to uniquely identify the instructional program within the school. Default is "N/A" or blank which extract as Track 99.
Assigned Period	Enter "Period 1".

Field	Description
Duration	Set this value to the duration of the student’s standard day including lunch, e.g., 420 minutes.
Multi-Age	Specify whether the homeroom includes students who are in different grade levels. For example, a split-grade homeroom is a type of multi-age homeroom which includes students from two or more grades.

9 Click Save.

## Printing a List of Homerooms

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 3, click Homerooms.
- 4 On the Homerooms List page, click the Print View icon (  ) to preview your report in the PDF Viewer then click the browser print button.



HR	Teacher	Grade	Room	Attendance	Meeting Pattern	Total/Capacity
<input type="checkbox"/> 1A	Ballentine, Emely Calaway, Jerrod H	1	105	Full Day		29/35
<input type="checkbox"/> 1B	Calaway, Jerrod H Ballentine, Emely	1	106	Full Day		32/35
<input type="checkbox"/> 1C	McCrary, Tabatha Kinne, Quinton	1	112	Full Day		26/35
<input type="checkbox"/> 1D	Kinne, Quinton McCrary, Tabatha	1	123	Full Day		38/35
<input type="checkbox"/> 2A	Procter, Marsha Higgins, Floyd	2	104	Full Day		0/-
<input type="checkbox"/> 2B	Higgins, Floyd Procter, Marsha	2	111	Full Day		0/-

To preview a report in the PDF Viewer, click the Print View icon.

## Scheduling Subjects

When you schedule subjects, you specify how subjects are assigned to students and how classes are created for the subjects.

After the staff, rooms, subject framework, and schedule structure are set up, you can schedule subjects. The Subject Scheduling page displays a list of all subjects and shows scheduling information. From this page, you can open the Edit Subject page to change the scheduling setup for a class or open the Class Setup page to assign classes to subjects, as well as assign teachers or rooms to classes.

### NOTE

The subjects and subject elements available for scheduling are defined in the Subject Framework, which is set up at the district. If you have questions or concerns about the subjects available at your school, contact your district administrator.

**To display the Scheduling Subjects page:**

- 1 Log on as a school administrator.
  - 2 In the control bar, under Admin, click Scheduling.
  - 3 On the Scheduling page, under Step 3, click Subject Scheduling.
- The Subject Scheduling page displays a list of all available subjects.

The screenshot shows the 'Scheduling > Subject Scheduling' interface. At the top, there are menu options: 'Actions', 'Edit', 'Help', 'Home', and 'Log off'. Below this is a 'Selected: 0' indicator and a pagination control showing '1 - 30 of 52' with 'Prev' and 'Next' links. The main table has the following columns: 'Subject Name', 'Grade', 'Designation', 'Auto-Assign', and '# Classes'. The first row is 'Creative Arts K' with Grade 'K', Designation 'Specialty', Auto-Assign 'Y', and '# Classes' '0'. An arrow points from the text 'To set up subject scheduling, click the subject name.' to the 'Creative Arts K' subject name. Another arrow points from the text 'To schedule classes, click the # Classes.' to the '0' in the '# Classes' column of the 'English/Second Lang 2' row.

To set up subject scheduling, click the subject name.

To schedule classes, click the # Classes.

The Subject Scheduling page displays the following information:

Field	Description
Subject Name	Lists all subjects for each grade they are offered. To set up subject scheduling, click the subject name. For detailed information about setting up subject scheduling, see "Setting Up Subject Scheduling" on page 64.
Grade	The grade the subject is offered for.
Designation	Indicates whether the subject is a core or specialty subject.
Auto-Assign	Indicates whether the subject is automatically assigned to all students in the grade level. You can change the auto-assign value when you set up subject scheduling. For more information about setting up subject scheduling, see "Setting Up Subject Scheduling" on page 64.
# Classes	Indicates the number of classes created for the Subject. To schedule classes, click the number of classes for the subject you want to schedule. If classes are already scheduled, the Class Setup page automatically filters the classes to show only the classes for the selected subject. For more information about scheduling classes, see "Setting Up Classes" on page 71.

## Setting Up Subject Scheduling

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 3, click Subject Scheduling and then click the name of the subject you want to schedule.

The Edit Subject page displays information about the subject, including scheduling information.

Scheduling > Subject Framework > Edit Subject

Actions Edit Help Home Log off

Language Arts 5

Generic subject: Language Arts

Grade level: 5

\*Subject number: LA-05

Designation: Core

Subject Elements Total: 4

Subject Element Name	Number
Comprehension	Comp 05
Reading	Reading 05
Grammar	Grammar 05
Writing	Writing 05

Schedule

Can schedule

Student:  Automatically assign this subject to all students in grade 5  
 School will assign this subject to individual students

Default teacher:  Homeroom teacher  
 School plans to use team teaching  
 Specify:

Number of rosters:  One roster per homeroom  
 Specify:

\*Required

The top of the page shows subject details.

- 4 On the Edit Subject page, in the Schedule section, indicate how a subject is to be scheduled:

Option	Description
Can schedule	To create classes for this subject, select Can Schedule. <b>IMPORTANT NOTE</b> If classes are already scheduled and you deselect this checkbox and click OK, the existing classes are deleted.



Option	Description
Student	<p>To quickly assign students to a subject, select "Automatically assign this subject to all students in grade <i>n</i>". The selected grade depends on which grade is associated with this subject in the subject framework. When you create student schedules, all students in the specified grade level are assigned a class for this subject. For more information about creating student schedules, see "Creating Student Schedules" on page 87.</p> <p>To have complete control over which students are assigned to this subject, select "School will assign this subject to individual students".</p>
Default teacher	<p>Indicate the teacher you want to assign to this subject. Select Homeroom Teacher or select Specify and select a teacher from the dropdown.</p> <p><b>NOTE</b> If you select Specify, you cannot select the homeroom teacher from the dropdown.</p> <p>If team teaching is used for this class, select "School plans to use team teaching".</p>
Number of rosters	<p>Indicate how you want to create rosters.</p> <p>If you select "One roster per homeroom", Chancery SMS creates one roster for each homeroom. For example, if there are three Grade 5 homerooms, this option creates three Language Arts 5 rosters.</p> <p>OR</p> <p>You can specify the number of rosters. For example, if a computer lab has a limited number of computers, you might have to create more rosters than there are homerooms for this subject.</p> <p>If you create two or more rosters, all students are placed in the first roster, by default. You can manually transfer students to other rosters later. For more information about transferring students, see the following topics:</p> <ul style="list-style-type: none"> <li>• "Changing Classes Assigned to Students" on page 103</li> <li>• "Modifying Homeroom and Class Rosters" on page 114</li> </ul> <p>If you specify the number of rosters, you must also specify a default teacher other than the homeroom teacher.</p>

**5** Click OK.

If a subject is taught in a room other than the homeroom, manually adjust the room when scheduling the class. For more information, see "Setting Up Classes" on page 71.

## Scheduling Core and Specialty Subjects

After you set up your teachers and homerooms and generic subjects, schedule the core and specialty subjects taught in your school. Core subjects are usually taught to all students in a grade. Specialty subjects might be taught to all or some students in a grade. When you schedule a core or specialty subject, students can be automatically assigned to that subject roster by grade level association.

For example:

- Language Arts is a core subject with a number of subject elements that are taught to all students in Grades 1 through 6. See “Example 1: Scheduling a Language Arts 5 Core Subject” on page 66.
- Art is a specialty subject taught to all students in Grades 5 and 6. This subject is taught by a specialty teacher in the Art Room. See “Example 2: Scheduling a Creative Arts 5 Specialty Subject” on page 68.
- Computers 5 is a specialty subject taught to all Grade 5 students. However, because there are only fifteen computers in the Computer Lab, you must create ten Computers 5 classes to accommodate 150 Grade 5 students. See “Example 3: Scheduling a Computers 5 Specialty Subject” on page 69.

### **Example 1: Scheduling a Language Arts 5 Core Subject**

- 1** Log on as a school administrator.
- 2** In the control bar, under Admin, click Scheduling.
- 3** On the Scheduling page, under Step 3, click Subject Scheduling and then click the name of the subject you want to schedule. For this example, click Language Arts 5.

- 4 On the Edit Subject page, under Schedule, indicate how a subject is to be scheduled.

Scheduling > Subject Framework > Edit Subject

Actions ▾ Edit ▾ Help ▾ | Home | Log off |

Language Arts 5

Generic subject:

Grade level:

\*Subject number:

Designation:

Subject Elements Total: 4

Subject Element Name	Number
Comprehension	Comp 05
Reading	Reading 05
Grammar	Grammar 05
Writing	Writing 05

Schedule

Can schedule

Student:  Automatically assign this subject to all students in grade 5  
 School will assign this subject to individual students

Default teacher:  Homeroom teacher  
 School plans to use team teaching  
 Specify:

Number of rosters:  One roster per homeroom  
 Specify:

\*Required

The top of the page shows subject details.

- 5 Make sure Can Schedule is selected.
- 6 To quickly assign students to a subject, select "Automatically assign this subject to all students in grade 5".  
 The specified grade depends on which grade is associated with this subject in the subject framework.
- 7 Indicate the teacher you want to assign to this subject. For this example, select Homeroom Teacher.
- 8 Indicate how you want to create rosters. For this example, select "One roster per homeroom". If there are three Grade 5 homerooms, choosing this option creates three Language Arts 5 rosters.  
 If you select "One roster per homeroom", classes are automatically created based on the number of homerooms and you cannot manually add classes to the subject. You must also specify a default teacher.

**9** Click OK.

If a subject is taught in a room other than the homeroom, manually adjust the room when scheduling the class. For more information, see “Setting Up Classes” on page 71.

**Example 2: Scheduling a Creative Arts 5 Specialty Subject**

**1** Log on as a school administrator.

**2** In the control bar, under Admin, click Scheduling.

**3** On the Scheduling page, under Step 3, click Subject Scheduling and then click the name of the subject you want to schedule. For this example, click Creative Arts 5.

**4** On the Edit Subject page, under Schedule, indicate how a subject is to be scheduled. For this example, select “School will assign this subject to individual students”.

The screenshot shows the 'Edit Subject' page for 'Creative Arts 5'. At the top, there is a navigation bar with 'Actions', 'Edit', and 'Help' menus, and 'Home | Log off' links. Below this, the subject name 'Creative Arts 5' is displayed. The 'Generic subject' is 'Creative Arts', 'Grade level' is '5', '\*Subject number' is 'CA-05', and 'Designation' is 'Specialty'. A section titled 'Subject Elements' shows a table with 3 elements: Drawing (Draw 05), Sculpting (Scupt 05), and Music (Music 05). The 'Schedule' section has several options: 'Can schedule' is checked; 'Student' is set to 'School will assign this subject to individual students'; 'Default teacher' is set to 'Specify' with 'Ballentine, E' selected; and 'Number of rosters' is set to 'Specify' with '4' entered. At the bottom, there are 'OK' and 'Cancel' buttons and a '\*Required' label.

The top of the page shows subject details.

**5** Make sure Can Schedule is selected.

**6** Indicate the teacher you want to assign to this subject. For this example, select Specify, and then select a teacher other than the homeroom teacher from the list of teachers.

- 7** Indicate how you want to create rosters. If the number of rosters for this subject is different from the number of homerooms in the subject's grade level, select Specify, and then enter the number of rosters you want to create.  
In this example, not all Grade 5 students are required to take Creative Art, so you need fewer rosters than the number of homerooms. For this example, create four rosters.
- 8** Click OK.
- 9** On the Subject Scheduling page, in the # Classes column, click the number of classes created for Creative Arts 5.
- 10** On the Class Setup page, in the # Students column, click the number of students assigned to the first roster.
- 11** On the Class Roster page, from the Actions menu, click Add Students.
- 12** Search for and add students to the roster. Click OK.
- 13** Repeat Steps 10 to 12 for the next roster.
- 14** Click OK.

### **Example 3: Scheduling a Computers 5 Specialty Subject**

- 1** Log on as a school administrator.
- 2** In the control bar, under Admin, click Scheduling.
- 3** On the Scheduling page, under Step 3, click Subject Scheduling.
- 4** On the Subject Scheduling page, click the name of the subject you want to schedule. For this example, click Computers 5.
- 5** On the Edit Subject page, under Schedule, indicate how a subject is to be scheduled. For this example, select "School will assign this subject to individual students".
- 6** Make sure Can Schedule is selected.
- 7** Indicate the teacher you want to assign to this subject. For this example, select Specify, and then select a teacher other than the homeroom teacher from the list of teachers.
- 8** Indicate how you want to create rosters. If the number of rosters for this subject is different from the number of homerooms in the subject's grade level, select Specify, and then enter the number of rosters you want to create.  
In this example, the Computer Lab might have a limited number of workstations. In order for each student in the class to get their own computer, you need to create more rosters than there are homerooms. For this example, create ten rosters.  
If you create two or more rosters, all students are placed in the first roster by default. You can manually transfer students to other rosters later. For more information about transferring students, see the following topics:
  - "Changing Classes Assigned to Students" on page 103

- “Modifying Homeroom and Class Rosters” on page 114

Scheduling > Subject Scheduling > Edit Subject

Actions Help | Home | Log off |

Computers 5

Generic subject: Computers

Grade level: 5

\*Subject number:

Designation: Specialty

Schedule

Can schedule

Student:  Automatically assign this subject to all students in grade 5  
 School will assign this subject to individual students

Default teacher:  Homeroom teacher  
 School plans to use team teaching  
 Specify: Arango, E

Number of rosters:  One roster per homeroom  
 Specify: 10

\*Required

OK Cancel

The top of the page shows subject details.

**9** Click OK, and click OK again.

If a subject is taught in a room other than the homeroom, manually adjust the room when editing a schedule. For more information, see “Setting Up Classes” on page 71.

# Defining Schedules for Classes

When you define schedules for classes, you assign teachers and rooms to classes. In addition, if you want to track instructional minutes and have set up the scheduling structure, you can also assign meeting patterns to classes.

## NOTE

**For Tennessee customer only:** EIS reporting does not use the schedule structure when calculating instructional minutes. Enter class schedule information in the Assigned Period and Duration fields by clicking the Custom link on the Class Setup page. For more information, see “Setting Up Classes by Subject” on page 75.

## Setting Up Classes

After you set up staff, rooms, homerooms, subjects, and the schedule structure (if desired), you can adjust the setup of individual classes. You can change the teachers assigned to classes, assign additional teachers to classes, assign classes to rooms, and assign meeting patterns to classes.

When classes are created, they are assigned to the default scheduling group. For more information about scheduling groups, see “Defining Scheduling Groups” on page 27.

You can use the Class Setup page to work with classes by subject, by teacher, or by room. For more information about setting up classes, see the following topics:

- “Setting Up Classes by Subject” on page 75
- “Setting Up Classes by Teacher” on page 80
- “Setting Up Classes by Room” on page 82

**To open the Class Setup page:**

- 1** In the control bar, click Scheduling.
- 2** On the Scheduling page, under Step 4, click Class Setup.  
The Class Setup page opens.





Click a tab to work with classes by subject, teacher, or room.

The following table describes the fields available in the Search Results on the Class Setup page and indicates any differences for the By Subject, By Teacher, or By Room options.



**NOTE**

You can change the columns displayed on this page. For more information, see “Changing Display Options in the Search Results Sections” on page 74.

Field	Description
List	The working lists of your recent searches.
Status	<p>Indicates whether the class has any conflicts.</p> <p>This column is blank until you click Save after making changes. It is also blank when the class has no conflicts.</p> <p>This column may contain the following icons:</p> <p> A teacher conflict for this class - that is, this class is scheduled but the teacher is scheduled for another class in the same period.</p> <p> A room conflict for this class - that is, this class is scheduled but the room is assigned to another class at the same time.</p>
Class Name	<p>The name of the class.</p> <p>Chancery SMS automatically creates a class name that indicates the generic subject name and the grade level. It also adds the homeroom number in round brackets (if One Roster per Homeroom is selected for the class) or the class number in square brackets (the number of rosters are specified for the class). You can change the default class name on the Class Setup page.</p>
Term	<p>If the schedule structure is set up and the class is assigned a meeting pattern, this field displays the term the class is offered in.</p> <p><b>NOTE</b> For schools using elementary scheduling, only full year term (FYT) is available.</p>
Meeting Pattern	<p>If the schedule structure is set up and the class is assigned a meeting pattern, this field displays the class meeting pattern.</p> <p>In elementary school scheduling, you do not need to assign a meeting pattern to classes unless you want to track instructional minutes or use supplementary attendance.</p> <p><b>NOTE</b> <b>For Tennessee customers only:</b> EIS reporting does not use the schedule structure when calculating instructional minutes. Enter class schedule information in the Assigned Period and Duration fields by clicking the Custom link on the Class Setup page. For more information, see “Setting Up Classes” on page 71.</p>
Teacher	The teacher assigned to the class.
Room	The room where the class is taught. If the class is taught in the homeroom, this field displays the homeroom number.
# Students	The number of students currently scheduled for the class. This number includes students who are scheduled to start the class in the future and excludes students who have been withdrawn from the class.
Capacity	Does not apply to schools using elementary scheduling.

Field	Description
Class #	Does not apply to schools using elementary scheduling.
Class Code	The code for the class.
Course #	The subject number of the subject associated with the class.
Course Alternate Name	Does not apply to schools using elementary scheduling.
Course Name	The subject name of the subject associated with the class.
Course Short Name	Does not apply to schools using elementary scheduling.
Scheduling Group	If the schedule structure is set up and the class is assigned a meeting pattern, this field displays the scheduling group assigned to the class.
State Course #	Does not apply to schools using elementary scheduling.
Teacher 2	If additional teachers are assigned to the class, this field displays the second teacher's name.
Teacher 3	If additional teachers are assigned to the class, this field displays the third teacher's name.
Team	Does not apply to schools using elementary scheduling.
Flag	A "T" in this column indicates that the class is being taught by a teacher other than the homeroom teacher. An "S" in this column indicates that the class has students from outside the homeroom.


## Changing Display Options in the Search Results Sections

The Class Setup page has tabs to allow you to set up classes by class, by teacher, or by room. Each tab includes search panels that allow you to search for specific classes, teachers, or rooms. On each of these search panels, you can change the information displayed in the search results section.

### To change the information displayed on the screen:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 4, click Class Setup.
- 4 Click the By Class, By Teacher, or By Room tab.
- 5 From the Edit menu, do one of the following:

On this tab	Do this
Class	Click Choose Columns > Class Search Results
Teacher	Click Choose Columns > Teacher Search Results
Room	Click Choose Columns > Room Search Results

- 6 In the Available Columns list, select the columns you want to display, and then click  to move them to the Selected Columns list.

- 7 Use the  and  buttons to set the display order.
- 8 Click OK.

## Setting Up Classes by Subject

When you set up classes by subject, classes are grouped by subject heading so you can easily see which classes have been created for each subject.

### NOTE

If, on the Edit Subject page, a subject is configured to have one roster for each homeroom, classes are created automatically based on the number of homerooms and you cannot add classes to the subject.

### To schedule classes for subjects:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 4, click Class Setup.
- 4 On the Class Setup page, click the By Subject tab.

To set up classes by subject, click the By Subject tab.

**5** Expand the Course Search panel and search for subjects.

OR

Click Display All Records.

The screenshot shows the 'Class Setup' interface with a table of search results. Annotations include:

- By default, if Number of Rosters is "One per homeroom" on the Edit Subject page, class names show the homeroom number in brackets. (Points to 'Creative Arts 7 (7/8A)')
- By default, if Number of Rosters is "Specify" on the Edit subject page, class names show the class number in square brackets. (Points to 'English/Second Lang 8 [1]')
- An Add Class button appears beside the subject name if Number of Rosters is "Specify" on the Edit Subject page. (Points to the 'Add Class' button next to 'English/Second Lang 8 [1]')
- To open the Edit Subject page, click the generic subject name. (Points to the subject name 'English/Second Lang 8 [1]')
- To display the class roster, click the # students. (Points to the number '1' in the '# Students' column for 'English/Second Lang 8 [1]')

Status	Class Name	Term	Meeting Pattern	Teacher	Room #	# Students	Flag
<input type="checkbox"/>	Creative Arts 7 (7/8A)	FYT		Blackledge, Christopher	A1	22	
<input type="checkbox"/>	Creative Arts 8 (7/8A)	FYT		Blackledge, Christopher	A1	6	
<input type="checkbox"/>	Creative Arts 8 (8-AD)	FYT		Kinne, Quinton	200	4	S
<input type="checkbox"/>	Creative Arts 8 (8-AM)	FYT		Calaway, Jerrod H	8	4	
<input type="checkbox"/>	Creative Arts 8 (8-PM)	FYT		Calaway, Jerrod H	888	2	
<input type="checkbox"/>	English/Second Lang 7 [1]	FYT		Blackledge, Christopher		1	
<input type="checkbox"/>	English/Second Lang 8 [1]	FYT		Blackledge, Christopher		1	T
<input type="checkbox"/>	Language Arts 7 (LA-07)						

**6** On the Class Setup page, do one of the following:

To	Do this
Add a class to a subject	<ul style="list-style-type: none"> <li>Click the Add button next to the subject and enter information about the class in the Class Information and Class Schedule sections.</li> </ul> <p><b>NOTE</b> If a subject does not have an Add Class button, the subject is configured to have one roster for each homeroom and you cannot add classes to the subject.</p>

To	Do this
Edit class information	<ul style="list-style-type: none"> <li>Click in the row of the class you want to edit, being careful not to click a link. When you click in the row for a class, the focus moves to that class.</li> </ul> <p>The Class Information, Class Constraints, State Reporting (Tennessee customers only), and Class Schedule sections open at the bottom of the page.</p>
Delete a class for a subject	<ol style="list-style-type: none"> <li>Select the class you want to delete.</li> <li>From the Action menu, click Delete Class Schedules. Click OK and skip remaining steps.</li> </ol> <p><b>NOTE</b></p> <p>When Can Schedule is selected for a subject and the Number of Rosters is set to “Specify”, the first class that Chancery SMS creates is used for automatic scheduling. You can rename this class, but you cannot delete it. If you want to delete all classes, on the Edit Subject page, deselect Can Schedule. Deselecting Can Schedule also removes the subject from the Class Setup page.</p> <p>Individual classes for a room cannot be deleted. To remove all classes for a homeroom, delete the homeroom.</p>

**7** On the Class Information panel, enter the following information, as required:

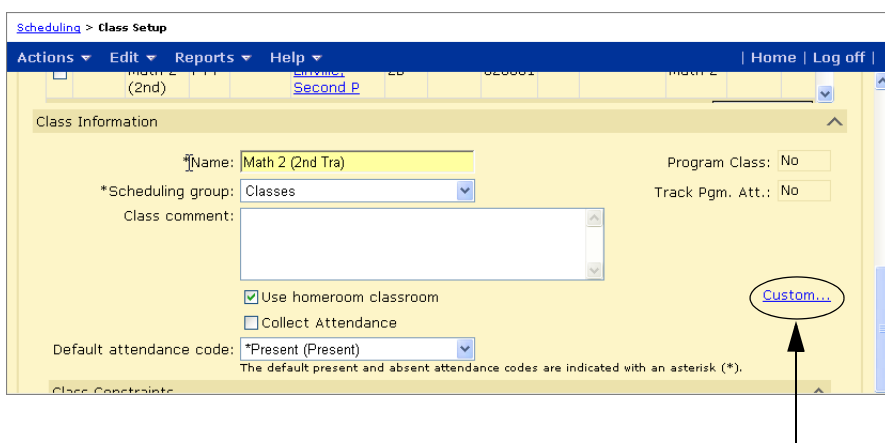
Field	Description
Name	<p>Chancery SMS automatically creates a class name that indicates the generic subject name and the grade level. It also adds the homeroom number in round brackets (if one roster per homeroom is selected for the class) or the class room number in square brackets (if the number of rosters are specified for the class).</p> <p>You can change the class name.</p> <p><b>NOTE</b></p> <p>To ensure class names are visible on screens and reports, limit the length of the name to 25 characters.</p>
Code	Enter a code for the class (optional).
Scheduling Group	Select the scheduling group this class belongs to. Classes must be assigned to a scheduling group, even if you are not using a schedule structure. For more information about scheduling groups, see “Defining Scheduling Groups” on page 27.
Class Comment	Additional information about the class. You can enter up to 270 characters.
Use Homeroom Classroom	If this class is taught in the homeroom classroom, select this option. If this option is selected, you cannot specify a room in the Class Schedule section for this class.
Collect Attendance	<p>Select this option, if your school uses supplementary attendance and you want to collect supplementary class attendance for this class. For more information about supplementary class attendance, see the Chancery SMS School Setup Guide.</p> <p><b>NOTE</b></p> <p>All classes that collect supplementary attendance must be assigned a meeting pattern.</p>

Field	Description
Default Attendance Code	If your school uses supplementary class attendance and supplementary class attendance is collected for this class, specify whether the attendance code should be assigned to this class by default. For more information about default attendance and supplementary class attendance, see the Chancery SMS School Setup Guide.

**NOTE**

The following steps (Steps 8 to 10) are for Tennessee customers only.

**8 Tennessee customers only:** Click Custom.



**9 Tennessee customers only:** On the State Reporting panel, enter the following information and click Apply:

Field	Description
Track	The number assigned to the Instructional program (Track) to uniquely identify the instructional program within the school. If no tracks are used, leave blank, which extracts as Track 99.
Assigned Period	Period of the day the class is to meet.
Duration	Period duration in minutes, excluding lunch. If your school uses self-contained homerooms and pullouts, the duration set for pullout classes is not included in the student's standard day. If your school uses fully-scheduled, discrete classes, the total duration for all traditional classes must be equal to the student's standard day excluding lunch.

**10 Tennessee customers only:** Click OK.

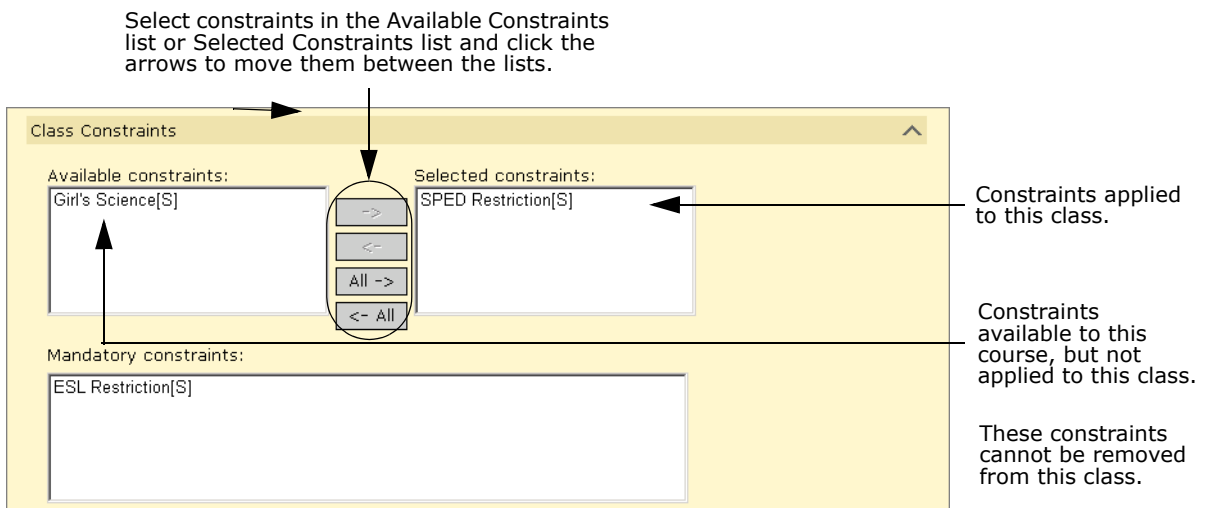
**11** On the Class Constraints panel, review the constraints for the class.

Constraints available, but not applied, to this class are listed in the Available Constraints list. Constraints applied to this class are shown in the Selected Constraints list. Constraints that are mandatory for this class are shown in the Mandatory Constraints list. For more information about constraints, see "Working with Constraints" on page 45.

- 12** To change the constraints applied to this class, select the constraint in the Available Constraint or Selected Constraints list and move it to the appropriate list.

**NOTE**

Mandatory constraints cannot be removed from the class.



- 13** On the Class Schedule panel, enter the following information:

Field	Description
Meeting Pattern	To assign specific meeting times for the class, select a meeting pattern. For more information about meeting patterns, see "Creating Meeting Patterns" on page 39.
Teacher	Select the teacher who teaches the class.
Other Teacher	If the class uses team teaching, select up to two additional teachers for the class. For more information about team teaching, see "Working with Team Teaching" on page 83.
Room	If "Use homeroom as classroom" option is not selected on the Class Information panel, select the room where the class is taught. If the class is taught in the homeroom, you cannot specify another room.

- 14** To add another class schedule for the class, click Add More Detail and enter the class schedule information.

**NOTE**

**For Tennessee customers only:** EIS Reporting does not support additional information entered using the Add More Detail option.

- 15** Click Save.

## Setting Up Classes by Teacher

When you set up classes by teacher, classes are grouped under a teacher heading so you can easily see which teachers are assigned to which classes. The teacher heading displays the teacher name plus their teacher number.

You can change the columns displayed in the Teacher Search Results and Class Search Results sections. For more information, see “Changing Display Options in the Search Results Sections” on page 74.

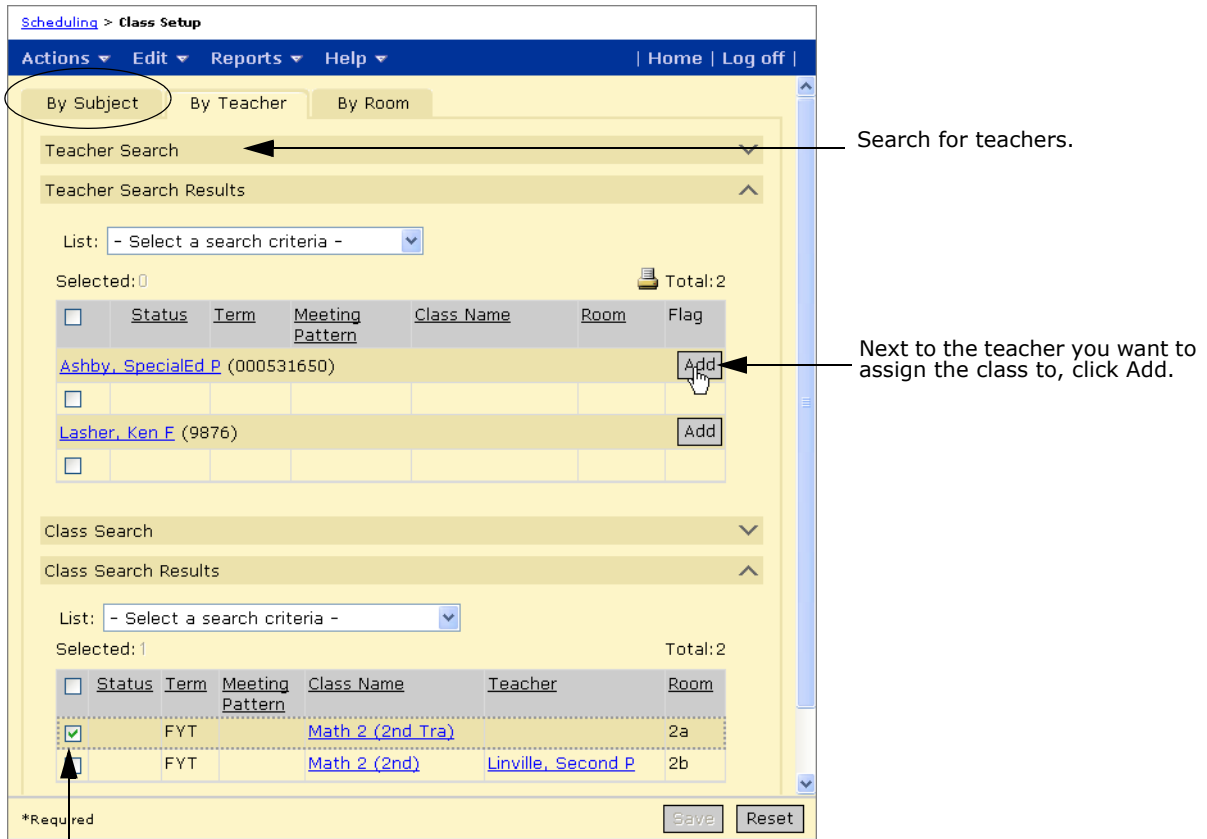
### To assign a class to a teacher:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 4, click Class Setup.
- 4 On the Class Setup page, click the By Teacher tab.
- 5 In the Teacher Search panel, search for a teacher.
- 6 In the Class Search panel, search for a class.
- 7 In the Class Search Results, select the class you want to assign.



- 8 In the Teacher Search results, next to the teacher you want to assign the class to, click Add.

You can assign a class to up to three teachers.



Search for and select classes.

- 9 Click Save.

**To delete a class from a teacher:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 4, click Class Setup.
- 4 On the Class Setup page, click the By Teacher tab.
- 5 On the Teacher Search panel, search for teachers.
- 6 In the Teacher Search Results, select the class you want to delete for a teacher.
- 7 From the Actions menu, click Remove from Schedule.
- 8 Click Save.

## Setting Up Classes by Room

When you set up classes by room, classes are grouped under rooms so you can easily see which rooms are assigned to which classes. Classes taught in a homeroom are listed under the room assigned to the homeroom.

You can change the columns displayed in the Room Search Results and Class Search Results sections. For more information, see "Changing Display Options in the Search Results Sections" on page 74.

### To add a class to a room:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 4, click Class Setup.
- 4 On the Class Setup page, click the By Room tab.
- 5 On the Room Search panel, search for a room.
- 6 On the Class Search panel, search for a class.
- 7 In the Class Search Results, select the class you want to assign.
- 8 In the Room Search Results, next to the room you want to assign the class to, click Add.

Classes can only be assigned to one room. If the class is already assigned to a room, assigning to another room changes the room assignment for the class.

The screenshot shows the 'Scheduling > Class Setup' interface. At the top, there are navigation tabs: 'By Subject', 'By Teacher', and 'By Room' (which is selected and circled). Below the tabs are two main search sections: 'Room Search' and 'Class Search'.

**Room Search Section:**

- Search dropdown: 'Room Search' (with an arrow pointing to it from the annotation 'Search for rooms.')
- Search criteria: 'List: Room number contains "1"'
- Results table:
 

Status	Term	Meeting Pattern	Class Name	Teacher	# Students	Flag
<input type="checkbox"/>						<input type="checkbox"/> Add

 (An arrow points to the 'Add' button with the annotation: 'Next to the teacher you want to assign the class to, click Add. Note that when you click Add, the class is reassigned from room 2a to room 1.')

**Class Search Section:**

- Search dropdown: 'Class Search' (with an arrow pointing to it from the annotation 'Search for and select classes.')
- Search criteria: 'List: Generic subject name contains "math"'
- Results table:
 

Status	Term	Meeting Pattern	Class Name	Teacher	Room
<input checked="" type="checkbox"/>	FYT		Math 2 (2nd Tra)		2a
<input type="checkbox"/>	FYT		Math 2 (2nd)	Linville, Second P	2b

At the bottom of the interface, there are 'Save' and 'Reset' buttons, and a '\*Required' label.

- 9 Click Save.

**To delete a class from a room:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 4, click Class Setup.
- 4 On the Class Setup page, click the By Room tab.
- 5 On the Room Search panel, search for a room.
- 6 In the Room Search Results, select the class you want to delete from the room.
- 7 From the Actions menu, click Remove from Schedule.
- 8 Click Save.

## Working with Team Teaching

Team teaching is useful when scheduling multiple teachers for subjects, especially core subjects. To accommodate teacher interests and qualifications, student learning level, and teaching assistants, set up your subjects to allow for team teaching as needed.

You can set up team teaching in two ways:

- Change the teacher for team teaching classes
- Transfer students between team teaching classes

### Example of Changing Teachers for Team Teaching Classes

This example of team teaching illustrates how you might modify class schedules so a specific teacher is assigned to a specific subject. For example, Grade 3 students are required to take Language Arts. In your school, Mr. Smith teaches all the Language Arts 3 classes.

- 1 Set up a subject, such as Language Arts 3, with the following scheduling options selected:
  - Students: automatically assign this subject to the selected grade
  - Default teacher: Homeroom Teacher and School Plans to Use Team Teaching
  - Number of classes: One Roster per Homeroom

For more information about setting up subjects, see "Reviewing the Subject Framework" on page 25.

- 2 On the Scheduling page, under Step 4, click Class Setup.
- 3 On the Class Setup page, click the By Subject tab.
- 4 In Subject Search, search for all classes in which "Uses Team Teaching" equals "Yes".
- 5 Select the first Language Arts 3 class you want to set up for team teaching.
- 6 In the Class Schedule section, from the Teacher dropdown, select Mr. Smith and click Save.
- 7 Select the next Language Arts 3 class and repeat Step 6. Repeat this step until you have assigned a teacher to all Language Arts 3 classes. Click OK.

On the Classes page, note the Flag column. A "T" in this column indicates that the class is being taught by a teacher other than the homeroom teacher.

## Example of Transferring Students to Team Teaching Classes

This example illustrates how you might use team teaching to assign specific students to certain teachers. For example, grade 5 has three levels of Math: weaker, regular, and stronger. Your school has three Grade 5 homerooms: 5-A, 5-B, and 5-C. The 5-A teacher teaches the weaker group, the 5-B teacher teaches the regular group, and the 5-C teacher teaches the stronger group. You can transfer your Grade 5 students from their default class roster to the class roster that best suits their mathematics ability.

- 1 Set up the Math 5 subject with the following scheduling options selected:
  - Students: Automatically Assign This Subject to the Selected Grade
  - Default teacher: Homeroom Teacher and School Plans to Use Team Teaching
  - Number of classes: One Roster per Homeroom
- 2 On the Scheduling page, under Step 4, click Class Setup.
- 3 Select Math 5 (5-A), Math 5 (5-B), and Math 5 (5-C).
- 4 From the Actions menu, click "Transfer Students between Classes".
- 5 At the top of the page, select Math 5 (5-A). In the list of students for the selected classes, select the weaker math students in Math 5 (5-B) and Math 5 (5-C). Click "Transfer to Selected Class".
- 6 Repeat Step 4 and 5 to transfer the regular students into Math 5 (5-B) and again to transfer the stronger students into Math 5 (5-C).
- 7 Return to the Classes page.

On the Classes list, note the Flag column. An "S" in this column indicates that the class has students from outside the homeroom.

## Scenarios of Team Teaching

The following are some team teaching scenarios you might encounter in your school, which you can accommodate by changing the teacher assigned to a homeroom, class, or subject roster.

### Scenario 1:

Swap rosters to accommodate teacher interests and qualifications.

The Homeroom 6-A teacher excels at teaching Math while the Homeroom 6-B teacher excels at teaching Social Studies.

Set up Math 6 and Social Studies 6 as subjects that allow team teaching. Edit the Class Schedule for these classes so that the Homeroom 6-A teacher provides instruction for both Math classes and the Homeroom 6-B teacher provides instruction for both Social Studies classes.

**Scenario 2:**

Two teachers are assigned to one homeroom, but teach different subjects. This is also referred to as co-teaching.

Homeroom 4-A is a homeroom with shared teaching responsibilities provided by Mr. Jones and Mrs. Garcia.

Edit the Class Schedule for Homeroom 4-A so Mr. Jones teaches Math while Mrs. Garcia teaches Social Studies.

**Scenario 3:**

Miss Smith is the primary teacher in Homeroom 5-B. In addition, a Teaching Assistant is assigned to Homeroom 5-B.



# Assigning Students to Homerooms and Classes

Build homeroom rosters by assigning students to homerooms. Before building homeroom rosters, set up the homerooms for your school. For more information about setting up homerooms, see “Setting Up Homerooms for Scheduling” on page 59.

If constraints are applied to a homeroom or class, the constraints are enforced at the time you assign students to homerooms or stand-alone classes. If the student does not fit the criteria, Chancery SMS displays an error message. If you have permission to override constraints, you can override the constraint to schedule the students into specific classes. For more information about constraints, see “Working with Constraints” on page 45.

Based on the student’s homeroom assignment, Chancery SMS assigns students to core classes and creates class rosters. For more information, see “Creating Student Schedules” on page 87. You can then adjust the class roster by transferring students to different classes.

All students in your school must be assigned to a homeroom. To quickly determine which students have yet to be assigned to a homeroom, search for students, and sort your search results by homeroom (HR). Students with an N/A homeroom are displayed together.

## NOTE

You can also change the information displayed on the Student Search Results page. For more information about changing the display, see “Changing Display Options on the Student Search Results Page” on page 91.

## Creating Student Schedules

In elementary schools, student class schedules are often based on their homeroom assignments. If subject options are set up to automatically assign the subject to all students in a grade, you can have Chancery SMS automatically create class schedules based on the student’s homeroom and grade assignments. After you assign students to homerooms, create student schedules to automatically assign students to classes based on their homeroom assignment. In general, you will create student schedules when scheduling in the planning calendar and early in the active calendar.

## NOTE

You cannot create student schedules if grades or attendance have been entered for the student. For information about setting subject options, see “Scheduling Subjects” on page 62.

### To create student schedules:

- 1 Log on as an school administrator.
- 2 In the control bar, click Scheduling.
- 3 On the Scheduling page, under Step 5, click Create Student Schedules.

- 4 On the Create Student Schedules page, select one of the following options:

Option	Description
All students	<p>Creates the student class assignments for all subjects that are set up to automatically assign the subject to all students in a grade.</p> <p>If a student already has auto-created class assignments for some of these subjects, these classes are cleared from their schedules and recreated as of the first day of school.</p> <p>Manually assigned or modified class schedules are not changed.</p> <p><b>NOTE</b></p> <p>In the active calendar, if you manually drop a class and re-assign the student to another class using the effective date option, “First Day of School”, the class change is deleted and the student is reassigned to their auto-generated class (except if both classes belong to the same subject; in this case the student must be manually reassigned).</p> <p>If you want to ensure this type of class change is not deleted, set the effective date to be the second day of school. However, be aware that this could affect grading and attendance at your school.</p> <p>In the planning calendar, if you select this option, manually dropped classes are recreated in the students’ schedules.</p>
Students with no auto-scheduled classes	<p>Creates student class assignments for subjects that are set up to automatically assign the subject to all students in a grade only if an auto-created class for that subject does not already exist.</p> <p>If a student already has auto-created class assignments for some subjects, these classes are not cleared from their schedules.</p> <p>Manually assigned or modified class schedules are not changed.</p>

- 5 Click OK.

## Transferring Homerooms from Student Search Results

In elementary school scheduling, all students must be assigned to a homeroom. The Transfer Homeroom page provides additional information about the distribution of students within homerooms that can assist you in assigning homerooms. On the Student Search Results page, where you select students to transfer, you can customize the display to show such information as gender and ethnic category, which may help you build balanced homeroom rosters. For more information about customizing the display, see “Changing Display Options on the Student Search Results Page” on page 91.

### NOTE

You can also change a student’s homeroom assignment on the Student Demographics page. However, the Transfer Homeroom page provides more detailed information about the available homerooms. For more information about enrolling students and assigning homerooms, see the Chancery SMS School Setup Guide.



**To transfer student homerooms:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 5, click Student Search.
- 4 Perform a basic or detail search, or click Display All Records.
- 5 On the Student Search Results page, select the students you want to assign to a homeroom.

For example, choose a group of Grade 5 students that you want to assign to a Grade 5 homeroom.

To help you determine the best homeroom assignment for specific students, you can adjust the information displayed on the student search page in the following ways:

- To display incoming or withdrawn students, click Edit > Include Incoming Students or Edit > Include Withdrawn Students (current year). You might want to include incoming students in the search results so you can assign pre-enrolled students to homerooms.
- To select columns to display on the page, click Edit > Choose Columns.
- To sort information in columns, click the column heading or, to create a sort order, click Edit > Sort.

- 6 From the Actions menu, click Transfer Homeroom.
- 7 On the Transfer Homeroom page, select the homeroom you want to transfer the selected students to, such as Homeroom 1-A.

Quick Search > Student Search Results > Transfer Homeroom

Help | Home | Log off

4 students selected in grade 1.  
Select the homeroom to transfer to for these students. The following statistics do not include the selected students.

HR	Teacher	Grade	M	F	Total	1	2	3	4	5
<input type="radio"/> 1-A	Dekleva, Anita	1	3	5	8	0	1	1	1	5
<input type="radio"/> 1-B	Plant, Charles	1	4	3	7	1	2	1	1	2

! Capacity will be exceeded.

Ethnic Categories:  
 1) Asian    4) Native American  
 2) Black    5) White  
 3) Hispanic

OK    Cancel

Check to see if the homeroom has enough space to accommodate the selected students.  
An exclamation mark indicates the homeroom is full.

The numbers correspond to the Ethnic Categories.

- 8 Click OK.

To adjust the balance and mix of students in a homeroom, repeat this procedure as many times as required.

## Changing Class Assignments

If subjects are set up to automatically assign classes to all students in a specified grade, the student’s schedule automatically includes these classes. From the student’s schedule, you can change automatic class assignments and assign classes that are not automatically assigned, such as specialty subjects.

### To change class assignments:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 5, click Student Search.
- 4 Search for the students and, in the Search Results, select the students you want to transfer.
- 5 From the Actions menu, click Open Student > Schedule.
- 6 If you are working in the active calendar, in Changes Effective, select the date you want the change to take effect.

Quick Search > Student Search Results > Student Schedule

Actions Edit Reports Help | Home | Log off |

Anspach, Patria 10020314 Gr-6 Female Nov 16, 1993

Homeroom: 6A - Vrooman, Earnest

Selected: 0 Total: 7

<input type="checkbox"/>	Term	Meeting Pattern	Class Name	Teacher	Room	Details
<input type="checkbox"/>	FYT		<a href="#">Language Arts 6 (6A)</a>	Vrooman, Earnest	121	
<input type="checkbox"/>	FYT		<a href="#">Mathematics 6 (6A)</a>	Vrooman, Earnest	121	
<input type="checkbox"/>	FYT		<a href="#">Science 6 (6A)</a>	Vrooman, Earnest	121	
<input type="checkbox"/>	FYT		<a href="#">Social Studies 6 (6A)</a>	Vrooman, Earnest	121	
<input type="checkbox"/>	FYT		<a href="#">Creative Arts 6 (6A)</a>	Vrooman, Earnest	121	
<input type="checkbox"/>	FYT		<a href="#">Remedial Math 6 (6A)</a>	Vrooman, Earnest	121	
<input type="checkbox"/>	FYT		<a href="#">Spanish Language 6 (6A)</a>	Vrooman, Earnest	121	

Add Class Drop Class Transfer Class Changes effective: Today

Class Search \*Change Reason: N/A

Class Search Save Reset

If you are working in the active calendar, specify the date you want the change to take effect.

The Change Reason dropdown is available in the active calendar if change reasons are set up at the district.

### 7 Do one of the following:

To	Do this
Add a class to the student’s schedule	<ol style="list-style-type: none"> <li>1 If you are working in the active calendar and Change Reasons are required, in the Change Reason dropdown, select the reason you are changing the student’s schedule.</li> <li>2 In the Class Search section, search for the class you want to add. Select the class and click Add Class.</li> </ol>

To	Do this
Drop a student from the class roster	<ol style="list-style-type: none"> <li>1 If you are working in the active calendar and Change Reasons are required, in the Change Reason dropdown, select the reason you are changing the student's schedule.</li> <li>2 From the student's schedule, select the class you want to remove. Click Drop Class.</li> </ol>
Transfer a student to a different class	<ol style="list-style-type: none"> <li>1 If you are working in the active calendar and Change Reasons are required, in the Change Reason dropdown, select the reason you are changing the student's schedule.</li> <li>2 In the Class Search section, search for the class you want to add. From the student's schedule, select the class you want to remove. Click Transfer Class.</li> </ol>

8 Click Save.

## Changing Display Options on the Student Search Results Page

- 1 Log on as a school administrator.
- 2 On any Student Search Results page, from the Edit menu, click Choose Columns.
- 3 On the Choose Columns page, select the columns that you want to display.

Quick Search > Student Search Results > Choose Columns

Actions ▾ Help ▾ | Home | Log off |

Available Columns:

- Contact name and phones
- Ethnic category
- Graduation Plan
- Home language
- Name (First, Middle Initial, Last)
- Placement classification
- Student home phone

Selected Columns:

- Name (Last, First, Middle Initial)
- Student number
- Grade
- Homeroom
- Gender
- Birthdate

Restore Defaults

OK Cancel

To set the column order, select an item, and then click the Up or Down arrow.

The order of the list (from top to bottom) corresponds to the order of the columns (from left to right).

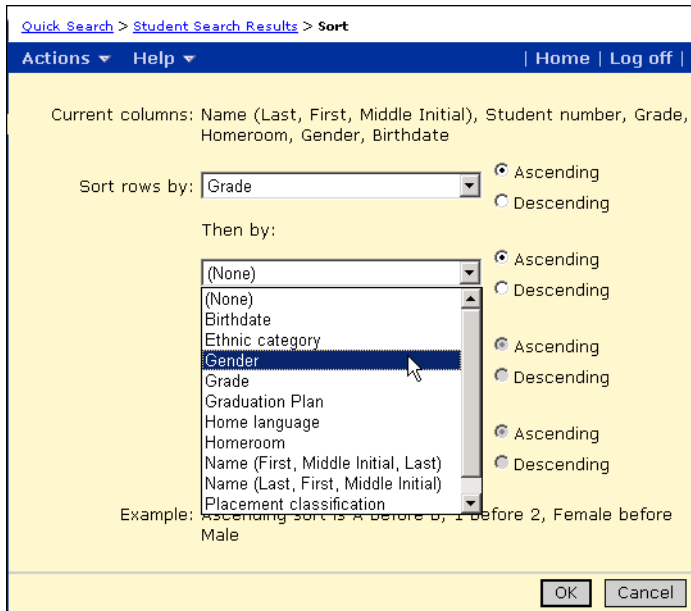
To display a column, click an item in the Available Columns list, and then click the -> button.

To remove a column, click an item in the Selected Columns list, and then click the <- button.

For example, to ensure all homerooms have a balance of boys and girls, along with a mix of ethnic categories, you might select the following columns:

- Name
- Homeroom
- Gender

- Ethnic Category
- 4 To return to the Student Search Results page, click OK.
  - 5 From the Edit menu, click Sort.
  - 6 On the Sort page, indicate how you want the data to be sorted.



**NOTE**

You can sort your data by columns not visible on the screen. For example, you might not see the Gender column, but you can still sort by gender.

- 7 Click OK.

# Setting Up Resource Services (active calendar only)

In addition to core and specialty subjects, you can set up resource services. For example, you can set up resource services for Remedial Reading and Math, Speech Therapy, Gifted and Talented Enrichment, and so on.

Resource services are typically taught by a resource teacher (who often moves between several schools). The resource service is usually taught in a small group or on an individual basis, either in a "pull-out" format where students are moved to another room for the class, or in an "inclusion" format where students are taught the resource service in the regular classroom.

You do not have to create classes for resource services. You can specify when each student receives a service, and whether it is given in an inclusion or in a pull-out format.

## NOTE

**For Tennessee customers only:** Resource services are not displayed on the District Setup > Schools > Classes page. As a result, resource services are not reported to EIS. To include special education classes in EIS reports, do not set up special education classes as resource services. Create a subject and schedule a class, as you would with regular classes.

## Creating Resource Services

### To create a resource service:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 6, click Resource Services.
- 4 From the Actions menu, click Add Resource Service.

The Add Resource Service page opens.

Scheduling > Resource Services > Add Resource Service

Actions Help | Home | Log off |

Add Resource Service

\*Resource service name:

\*Short name:

Service number:

Related subject: None

Scheduling

Default Teacher: None

You do not have to create classes for resource services. For each student, the school can specify when the student receives a service and whether it is given in the regular classroom or in a pullout.

OK Cancel

- 5 On the Add Resource Service page, enter the necessary information.

Field	Description
Resource Service Name	Enter a resource service name, such as Reading Recovery.
Short Name	Enter a short name.
Service Number	Enter the resource service number.
Related Subject	Select a subject or subject element.
Default Teacher	If necessary, select the default teacher for this resource service.

- 6 Click OK.

**To change resource services:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 6, click Resource Services.
- 4 Click the resource service name you want to change.

OR

To change multiple resource services, select the resources services you want to change. From the Actions menu, click Edit Resource Services.

- 5 Change the information for the selected resource services. Click OK.

## Assigning Resource Services to Students

After resource services are set up, you can schedule students to receive the resource service. For more information about setting up resource services, see "Creating Resource Services" on page 93.

You can also schedule resource services for individual students from the Student Schedule page. For more information, see "Scheduling Resource Assignments" on page 107.

**To schedule resource assignments:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 6, click Resource Roster.
- 4 On the Resource Roster page, from the View dropdown, select a specific resource service, a specific resource assignment, or All Resource Assignments.

To display students who have received a resource service in the past or are scheduled to receive resource services in the future, but who are not currently receiving resource services, from the Edit menu, click Show Incoming Students or Show Past Students.

**5** Do one of the following:

To	Do this
Add a resource assignment	<ul style="list-style-type: none"> <li>From the Actions menu, click Add Resource Assignment.</li> </ul>
Edit a resource assignment	<ul style="list-style-type: none"> <li>Click the name of the resource assignment you want to edit. OR Select the resource assignment you want to edit. From the Actions menu, click Edit Resource Assignment.</li> </ul>
Delete a resource assignment	<ol style="list-style-type: none"> <li>Select the resource assignment you want to delete.</li> <li>From the Actions menu, click Delete Resource Assignment.</li> <li>Click OK and skip the remaining steps.</li> </ol>

When you add or edit a resource assignment, the Add Resource Assignment or Edit Resource Assignment page opens.

**6** On the Add Resource Assignment or Edit Resource Assignment page, enter or edit the necessary information.

Field	Description
Student Name	Click Select Student to search for and select a student.
Resource Service	Select a resource service. After you save this record, this field becomes view-only.
Related Subject	Shows any related subjects defined for the resource service.
Comment	Enter a comment of up to 500 characters, such as the reason the student is assigned this resource service.

Field	Description
Start and End date	Enter the dates that the resource assignment will start and end. If a student's resource schedule changes during the year, you can duplicate the student's resource assignment and change the scheduling information. See "Tracking Resource Assignment Changes" on page 96.
Instructional Model	Select whether this resource service is taught in the regular classroom, or if it is taught in another room. If it is taught in a different room, specify the room.
Teacher	Select up to three teachers for the resource assignment.
Minutes Per Week	Enter the number of minutes this student receives this resource service each week.
Meeting Times	Enter the time that the student and teacher will meet for the resource assignment.

**7** Click OK.

To keep track of resource assignment changes, or to copy the same resource information to multiple students, see "Tracking Resource Assignment Changes" on page 96.

## Tracking Resource Assignment Changes

The schedule of a student's resource assignments might change during the school year. For example, the amount of time they receive the resource service might increase from 120 minutes to 180 minutes each week beginning on November 1. You might need to track both the old and new schedules. You can change the student's resource assignment end date to October 31, duplicate the resource assignment, and change its start date to November 1 and its minutes per week to 180.

When several students take the same resource service together, duplicate the resource assignment and change the student information.

### To duplicate a resource assignment:

- 1** Log on as a school administrator.
- 2** In the control bar, under Admin, click Scheduling.
- 3** On the Scheduling page, under Step 6, click Resource Roster.
- 4** On the Resource Roster page, select the student whose resource assignment you want to duplicate.  
If necessary, from the View dropdown, select an option to narrow the list of students.
- 5** From the Actions menu, click Copy Resource Assignment.



- 6 To assign the resource service to another student, on the Add Resource Assignment page, click Select Student beside the student name. In the Select Student dialog, choose another student and click OK.

OR

To change resource information for the same student, change the roster information such as the resource service, start and end dates, minutes per week, or the meeting time.

For example, if a student's resource assignment changes from 120 to 180 minutes each week starting November 1, enter 180 minutes and a start date of November 1. Then, in the student's old resource assignment, change the end date to October 31.

- 7 Click OK.



# Working with Student Schedules

If subjects are set up to automatically assign the subject to all students in a grade, when you assign students to homerooms and create student schedules, Chancery SMS schedules students into automatically-generated classes. You can then view student schedules and make any necessary adjustments.

## NOTE

Student schedules display the student’s schedule as of the end of the school year. To see changes made to the student’s schedule and their effective date, from the Actions menu, click View Change History. For more information about Change History, see “Viewing Change History” on page 108.

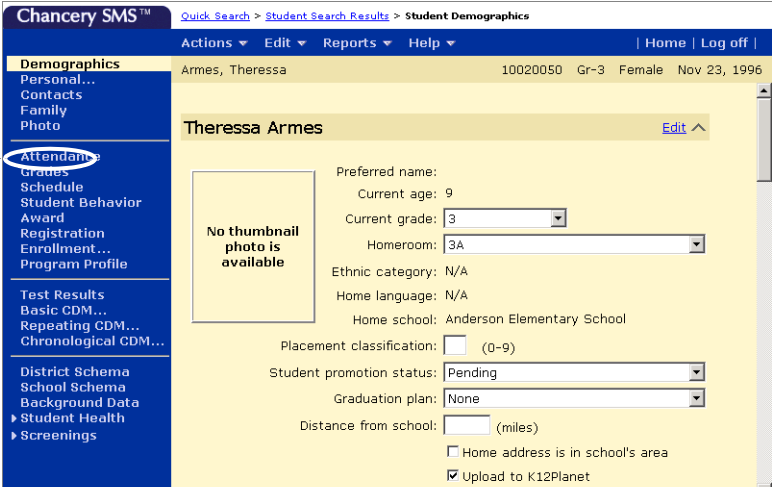
## Opening Student Schedules

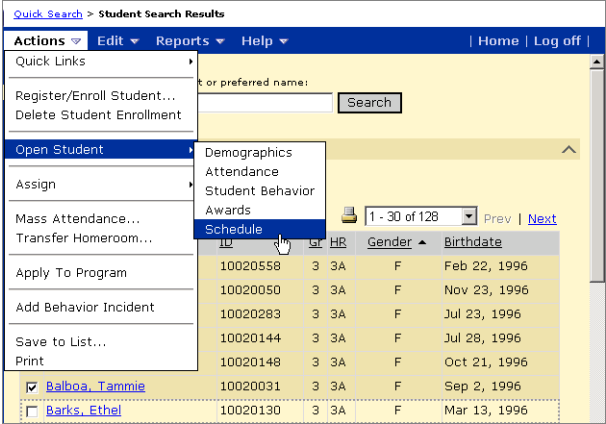
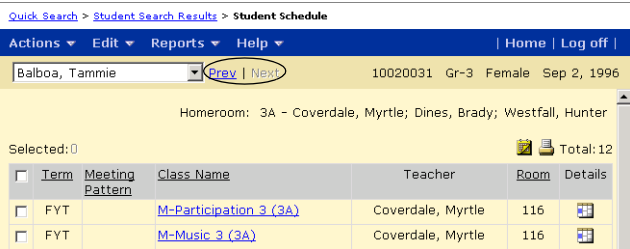
You can use the Student Schedule page to view and adjust individual student schedules. From this page, you can also assign subject exceptions, manually assign classes, or assign resource assignments.

You can open student schedules for individual students from the Student Demographics page, or you can go directly to the student schedule for one or more students from any student search results page.

## NOTE

The Open Student>Schedules option on the Student Search Results page offers a quick way to open student schedules and allows you to open multiple student schedules at one time.

Task	Procedure
<p>Open a student schedule from the Student Demographics page</p>	<ol style="list-style-type: none"> <li><b>1</b> Open the student record you want to view. For information about opening student records, see “Working With Student Records” on page 10.</li> <li><b>2</b> On the Student Demographics page, in the control bar, click Schedule.</li> </ol> 

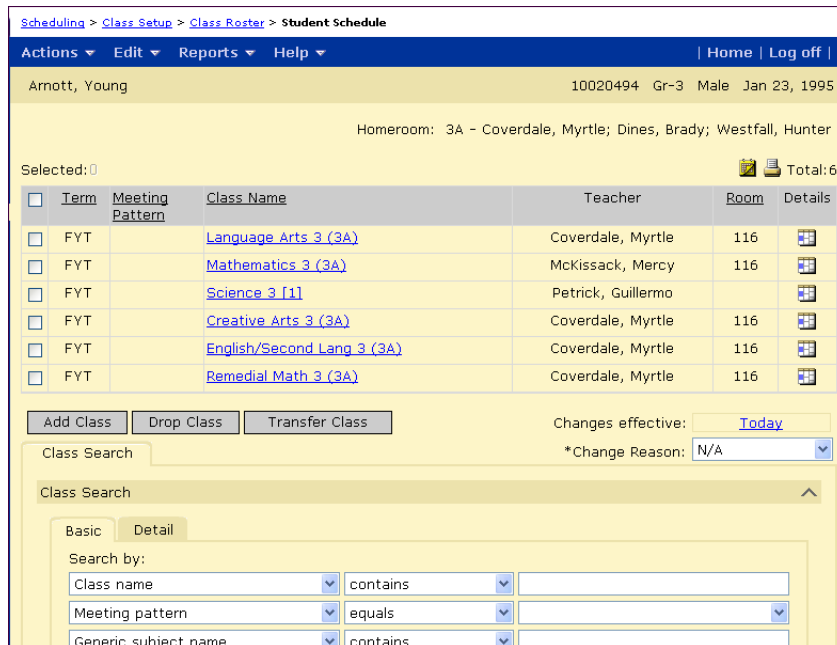
Task	Procedure
<p>Opening Student Schedules From Student Search Results</p>	<ol style="list-style-type: none"> <li>1 Log on as a school administrator.</li> <li>2 Search for a student.</li> <li>3 From the Student Search Results, select the students whose schedules you want to view.</li> <li>4 From the Actions menu, click Open Student&gt;Schedule.</li> </ol>  <ol style="list-style-type: none"> <li>5 If you selected more than one student, on the Student Schedule page, click Prev and Next to page through the open student schedules.</li> </ol> 

## Understanding the Student Schedule Page

This section provides an overview of the Student Schedule page. For detailed procedures about using the Student Schedule page, see the following topics:

- “Changing Classes Assigned to Students” on page 103
- “Transferring Homerooms from Student Schedules” on page 104
- “Using Subject Exceptions” on page 105
- “Scheduling Resource Assignments” on page 107
- “Viewing Change History” on page 108

The Student Schedule page displays the following information:



**NOTE**

To change the information displayed on this page, from the Edit menu, click Choose Columns.

Field	Description
Term	Indicates which term the subject is taught in. In elementary schools, all subjects are scheduled for the full year term (FYT).
Meeting Pattern	Indicates the meeting pattern assigned to the class. In elementary school scheduling, assigning meeting patterns to classes is optional. For information about assigning meeting patterns to classes, see "Setting Up Classes" on page 71.
Class Name	Indicates the name of the class. To display the class roster, click the class name.
Teacher	Indicates the teacher assigned to teach this class. For more information about assigning teachers to classes, see "Setting Up Classes" on page 71.
Room	Indicates the room assigned to the class. For information about assigning rooms to classes, see "Setting Up Classes" on page 71.
Details	Click the icon to view additional information about the class and subject.

Field	Description
Changes Effective	<p>If you are working in the active calendar, specify the date the changes will take effect. The specified date will apply to all changes made.</p> <p><b>NOTE</b> If you set the effective date to “First Day of School” and manually drop or transfer classes from a student’s schedule, if you then create student schedules for all students, the dropped classes are re-added to the student’s schedule. If you enter a specific date (i.e. not the first day of school), the classes are not re-added. For more information about creating student schedules, see “Creating Student Schedules” on page 87.</p>
Change Reason	<p>In the active calendar, this dropdown appears if change reasons are defined at the district. Change reasons may be required or optional.</p> <p>If change reasons are required, you must enter a different change reason code for each change (add, drop, transfer) made to the students schedule.</p> <p>Select the reason the students schedule is being changed.</p>

## Assigning and Reassigning Default Classes

For subjects set up to automatically assign the subject to all students in a grade, default classes are assigned to students based on their homeroom assignment. In general, the default classes are assigned when you create student schedules during the scheduling process. For more information, see “Creating Student Schedules” on page 87. However, if a student enrolls in a school after schedules are created, you may want to assign default classes for individual students. If you have the Subject Scheduling permission set to “Yes”, you can also recreate an individual student’s schedule by reassigning default classes.

### IMPORTANT NOTE

When you assign or reassign default classes, Chancery SMS recreates classes based on homeroom and grade. If a student is transferred from one homeroom to another in the middle of the school year, Chancery SMS generates a set of class assignments for the student’s previous homeroom or grade from the first day of school to the transfer day, then another set of class assignments for the new homeroom or grade from the transfer day to the last day of school. The Effective Date option is not considered. Manually added classes are not changed.

### To assign default classes:

- 1 Log on as a school administrator.
- 2 Open a student record.
- 3 In the control bar, click Schedule.
- 4 On the Student Schedule page, click Assign Default Classes.

### NOTE

If the Assign Default Classes button is not available or is replaced with the Reassign Default Classes button, this student already has at least one default class assigned.

- 5 Click OK.

**To reassign default classes:**

- 1 Log on as a school administrator.
- 2 Open a student record.
- 3 In the control bar, click Schedule.
- 4 On the Student Schedule page, click Reassign Default Classes.

**NOTE**

If the Reassign Default Classes button is not available, make sure you have the Subject Scheduling permission set to “Yes”. If the Assign Default Classes button is available, the student does not currently have any default classes assigned.

- 5 Click OK.

## Changing Classes Assigned to Students

**NOTE**

Student schedules display the student’s schedule as of the end of the school year. To see changes made to the student’s schedule and their effective date, from the Actions menu, click View Change History. For more information about Change History, see “Viewing Change History” on page 108.

If subjects are set up to automatically assign classes to all students in a specified grade, once you create student schedules, the student’s schedule automatically includes these classes. For more information about creating student schedules, see “Creating Student Schedules” on page 87.

From the student’s schedule, you can change automatic class assignments and assign classes that are not automatically assigned, such as specialty subjects. On the Student Schedule page, you can add, drop, or transfer courses in the student’s schedule.

**To change classes assigned to students:**

- 1 Log on as a school administrator.
- 2 Open a student schedule.  
For more information about opening student schedules, see “Working with Student Schedules” on page 99.
- 3 If you are working in the active calendar, from the Changes Effective dropdown, select when you want the changes to take effect.

**NOTE**

If you set the effective date to “First Day of School” and manually drop or transfer classes from a student’s schedule, if you then create student schedules for all students, the dropped classes are re-added to the student’s schedule. If you enter a specific date, the classes are not re-added. For more information about creating student schedules, see “Creating Student Schedules” on page 87.

- 4 Do one of the following:

To	Do this
Add a class to the student’s schedule	<ol style="list-style-type: none"> <li>1 If you are working in the active calendar and change reasons are set up at the district, select the reason the student’s schedule is being changed.</li> <li>2 In the Class Search section, search for the class you want to add. Select the class and click Add Class.</li> </ol>

To	Do this
Remove a class from the student's schedule	<ol style="list-style-type: none"> <li><b>1</b> If you are working in the active calendar and change reasons are set up at the district, select the reason the student's schedule is being changed.</li> <li><b>2</b> From the student's schedule, select the class you want to remove. Click Drop Class.</li> </ol>
Transfer the student from a class into a different class	<ol style="list-style-type: none"> <li><b>1</b> If you are working in the active calendar and change reasons are set up at the district, select the reason the student's schedule is being changed.</li> <li><b>2</b> In the Class Search section, search for the class you want to add. From the student's schedule, select the class you want to remove. Click Transfer Class.</li> </ol>

- 5** Click Save.

## Transferring Homerooms from Student Schedules

You can change a student's homeroom assignment from within the student schedule. You can also assign a new homeroom directly from a student search. For more information about assigning homerooms from a student search, see "Transferring Homerooms from Student Search Results" on page 88.

### NOTE

Student schedules display the student's schedule as of the end of the school year. To see changes made to the student's schedule and their effective date, from the Actions menu, click View Change History. For more information about Change History, see "Viewing Change History" on page 108.

### To change homeroom assignments:

- 1** Log on as a school administrator.
- 2** Open a student schedule.  
For more information about opening student schedules, see "Working with Student Schedules" on page 99.
- 3** On the Student Schedule page, from the Actions menu, click Transfer Homeroom.



- On the Transfer Homeroom page, select the homeroom you want to assign the selected student to.

Homerooms > Roster > Transfer Homeroom

Help | Home | Log off |

6 students selected in grade 3.  
Select the homeroom to transfer to for these students. The following statistics do not include the selected students.

HR	Teacher	Grade	M	F	Total	1	2	3	4	5
<input type="radio"/> 3-A	Lee, Daniela	3	2	2	4	0	3	0	0	1
<input checked="" type="radio"/> 3-B	Paterson, Diane	3	7	3	10 !	1	5	0	0	3

Total: 2

! Capacity will be exceeded.

Ethnic Categories:  
 1) Asian    4) Native American  
 2) Black    5) White  
 3) Hispanic

OK Cancel

Check to see if the homeroom has enough space to accommodate the selected students.

An exclamation mark indicates the homeroom does not have enough space to accommodate the selected students.

The numbers correspond to the Ethnic Categories.

- Click OK.
- In the Class Change Options dialog, specify when you want the change to take effect and, if required, select the reason the student’s homeroom is being changed. Click OK.
- Click OK.

The student’s homeroom is changed and all classes taught in the homeroom class are changed to classes taught in the new homeroom.

**NOTE**

Manually scheduled classes are not changed.

## Using Subject Exceptions

Subject exceptions allow you to adjust student schedules to meet individual student needs.

**NOTE**

**Tennessee customers only:** Subject exceptions are not included in EIS reporting.

If a student is working at a level ahead of or behind their peers, but still in the regular classroom, you can record that the student is taking a subject exception. For example, if you have a Grade 3 student who is working at a Grade 4 level in Math, you can assign the student to Math 4 without removing the student from the Math 3 classroom.

Before you schedule subject exceptions, be sure you understand how exceptions affect grading. For more information, see “Understanding Scheduling Exceptions and the Impact on Grading” on page 106.

If you want to assign special services to students for short periods of time, you can assign resource services. For more information about resources services, see “Setting Up Resource Services (active calendar only)” on page 93 or “Scheduling Resource Assignments” on page 107.

## Adding and Ending Subject Exceptions


To assign a student to a different class within their regular classroom, add a subject exception. To return the student to their regular class, end the subject exception. When you end a subject exception, Chancery SMS retains a record of the subject exception unless the subject end date is the same as its start date.

### To assign a subject exception:

- 1 Log on as a school administrator.
- 2 Open a student schedule.  
For more information about opening student schedules, see “Working with Student Schedules” on page 99.
- 3 On the Student Schedule page, select the class you want to exempt. From the Actions menu, click Add Subject Exception.
- 4 On the Add Subject Exception page, select the subject the student will take in place of the current subject. Click OK.
- 5 In the Class Change Options dialog, specify when you want the change to take effect and, if required, select the reason the subject exception is being applied. Click OK.

### To end a subject exception:

- 1 Log on as a school administrator.
- 2 Open a student schedule.  
For more information about opening student schedules, see “Working with Student Schedules” on page 99.
- 3 From the Changes Effective dropdown, select when you want the change to take effect.
- 4 Select a class with a Subject Exception that you want to end.
- 5 From the Actions menu, click End Subject Exception.

The Student Schedule page displays the student’s revised schedule. If the subject exception end date is the same as its start date, the subject exception icon () disappears.

## Understanding Scheduling Exceptions and the Impact on Grading

In most cases, when you schedule subjects, the students are graded in the class rosters to which they are assigned. For example, a student in Math 4 (Homeroom 4-A) is graded in the Math 4 (Homeroom 4-A) roster.

There are some exceptions:

- Remedial or Advanced Instruction (Same Classroom) – When a Math 4 student has a subject exception for Math 5, this student receives Math 5 level instruction within the Math 4 classroom. That means the student is still in the Math 4 roster and will be graded in that roster using Math 4 skills and measures.
- Remedial or Advanced Instruction (New Classroom) – When a student is taking Advanced Math 5 instead of regular Math 5 and receiving that instruction in a different room, set up Advanced Math 5 as a subject. The advantage of scheduling this class as a separate subject is that you can then use unique skills and measures on the report card. However,

if you want to use the same skills and measures on the report card as regular Math 5, you do not have to create a separate subject. Instead, set the number of classes for Math 5 so that there is an extra class which you can use for the Advanced Math 5 group. In this scenario, grade students using the same skills and measures as regular Math 5.

- Elective Subject Elements – When students have the option of taking more than one elective to fulfill the requirements for a class, the best solution is to set up the generic subject, such as Music, and then set up the subject elements, such as Choir and Band. When you set up the subject framework this way, the subject elements appear on the report cards for all students in the applicable grade levels. Teachers then enter grades for those students taking Choir as their Music 6 elective while marking Band as N/A, and vice versa. All students will appear in the Music 6 class roster, regardless of which elective they choose to complete.

## Scheduling Resource Assignments


From the Student Schedule page, you can add or delete resource assignments for individual students. Assign resources to students who require extra attention because they may be struggling or advanced. For example, resource services include Remedial Reading and Math, Speech Therapy, Gifted and Talented Enrichment, and so on.

Before you add a resource assignment to a student schedule, you must set up resource services. For more information about setting up resource services, see “Setting Up Resource Services (active calendar only)” on page 93.

If you want to assign the same resource service to multiple students, use the Resource Roster. For more information about assigning resource services to multiple students, see “Assigning Resource Services to Students” on page 94.

### To add a resource assignment to a student’s schedule:

- 1 Log on as a school administrator.
- 2 Open a student schedule.  
For more information about opening student schedules, see “Working with Student Schedules” on page 99.
- 3 From the Actions menu, click Add Resource Assignment.
- 4 On the Add Resource Assignment page, enter the required resource service information.
- 5 Click OK.

The Student Schedule page displays the student’s revised schedule. The Resource Assignment icon (  ) indicates resource assignments.

### To delete a resource assignment from a student’s schedule:

#### NOTE

When you delete a resource assignment, you delete all record of the assignment. If you want to end a resource assignment without deleting the entire record, adjust the End Date for the resource assignment.

- 1 Log on as a school administrator.
- 2 Open a student schedule.  
For more information about opening student schedules, see “Working with Student Schedules” on page 99.

- 3 Select a Resource Assignment.
- 4 From the Actions menu, click Delete Resource Assignment.
- 5 Click OK.

The Student Schedule page displays the student's revised schedule.

## Viewing Change History

Use Chancery SMS to view a history of changes for each class that a student has enrolled in. For example, you can view when a student has transferred from one class to another or when they changed homerooms. For each change, you can specify the effective date, select a change reason, and include a comment.

The schedule change history is only available in the active calendar and only shows changes over time. For example, if a class is added and dropped as of the same day, the change is not recorded in the change history.

### To view a student's change history:

- 1 Log on as a school administrator.
- 2 Open a student schedule.  
For more information about opening student schedules, see "Working with Student Schedules" on page 99.
- 3 On the Student Schedule page, from the Actions menu, click View Change History.  
The Schedule Change History page displays a list of the changes made to the student's schedule.
- 4 To change the effective date, change reason, or comment for a specific schedule change, in the Start column, click the start date or select the schedule change and click Edit.

Quick Search > Student Search Results > Student Schedule > Schedule Change History

Actions Help | Home | Log off |

Arnott, Young 10020494 Gr-3 Male Jan 23, 1995

Grade and Homeroom Change History

Selected: 0 Total: 1

<input type="checkbox"/>	Grade	Homeroom	Start	Change Reason	Comment
<input type="checkbox"/>	3	3B	May 08, 2005	01	

Edit... Undo Last

Class Change History

Note: Only the last change within each set of changes can potentially be undone (indicated by a 'Y' in the Can Undo column). Other business rules may still prevent you from undoing this transaction.

Selected: 0 Total: 3

<input type="checkbox"/>	Drop Class	Add Class	Start	Change Reason	Comment	Can Undo
<input type="checkbox"/>		English/Second Lang 3 [1]	May 23, 2005	02		Y
<input type="checkbox"/>	Language Arts 3 (3B)		May 23, 2005	01		Y
<input type="checkbox"/>	Mathematics 3 (3B)	Mathematics 3 (3A)	Jun 01, 2005	02		Y

Edit... Undo Selected

Subject Exception History

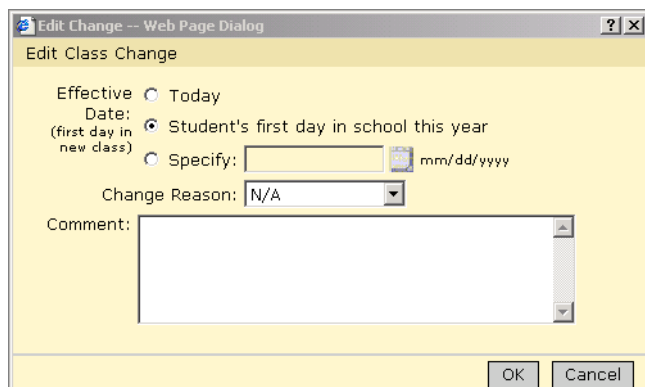
Selected: 0 Total: 1

<input type="checkbox"/>	Normal Subject	Exception	Start	End	Comment
<input type="checkbox"/>	Science 3	Science 4	May 13, 2005	Dec 31, 9999	

Edit... Delete

To see the change reason description, pause the cursor over the change reason code.

- 5 On the Edit Change page, make the necessary changes and click OK.



## Reversing Student Schedule Changes

From the Change History page, you can reverse some changes made to the student's schedule. You can only undo the last change within each set of changes. If a change can be undone, a "Y" appears in the Can Undo column.

### To undo a change to the students schedule:

- 1 Log on as a school administrator.
- 2 Open a student schedule.  
For more information about opening student schedules, see "Working with Student Schedules" on page 99.
- 3 On the Student Schedule page, from the Actions menu, click View Change History.
- 4 Select the change you want to reverse.  
There must be a "Y" in the Undo column.
- 5 Click Undo Last or Undo Selection. Click OK.



# Working with Homeroom and Class Rosters

Rosters provide a list of students assigned to a homeroom or class. Generally, you assign students to a homeroom and they are automatically assigned to classes based on their homeroom assignment. If a class is set up so the school assigns students, you can manually assign the class to specific students. For more information about setting up classes, see "Setting Up Classes" on page 71.

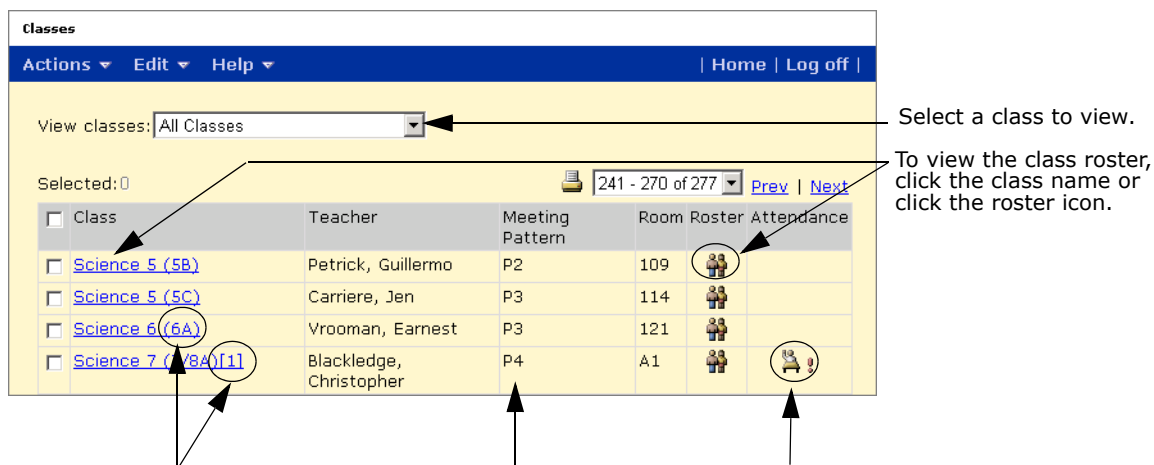
You can use rosters to view a list of students assigned to a class or homeroom and make adjustments, as required.

## Viewing Class Rosters






- 1 Log on as a school administrator.
- 2 In the control bar, under Class, click Classes.
- 3 On the Classes page, click the class you want to view.

OR

On the Classes page, click the Roster icon () for the class you want to view.



The screenshot shows the 'Classes' page interface. At the top, there is a navigation bar with 'Actions', 'Edit', and 'Help' menus, and 'Home' and 'Log off' links. Below this is a 'View classes:' dropdown menu set to 'All Classes'. A 'Selected: 0' indicator is present. A table lists classes with columns for Class, Teacher, Meeting Pattern, Room, Roster, and Attendance. The table contains four rows of class data. Annotations with arrows point to specific elements: 'Select a class to view.' points to the dropdown menu; 'To view the class roster, click the class name or click the roster icon.' points to the class name and the roster icon in the first row; 'By default, the class name includes room numbers...' points to the class names in the first two rows; 'If meeting patterns are assigned to a class...' points to the Meeting Pattern column; and 'If supplementary class attendance is collected...' points to the Attendance column.

Class	Teacher	Meeting Pattern	Room	Roster	Attendance
<a href="#">Science 5 (5B)</a>	Petrick, Guillermo	P2	109		
<a href="#">Science 5 (5C)</a>	Carriere, Jen	P3	114		
<a href="#">Science 6 ((6A))</a>	Vrooman, Earnest	P3	121		
<a href="#">Science 7 ((784)F11)</a>	Blackledge, Christopher	P4	A1		

By default, the class name includes room numbers. Numbers in round brackets indicate the homeroom number and numbers in square brackets indicate the class number (if the number of rosters is specified for the class).

If meeting patterns are assigned to a class, the assigned meeting pattern appears in the Meeting Pattern column.

If supplementary class attendance is collected for the class, an Attendance icon appears in the Attendance column.

- 4 On the Class Roster page, you can change the information displayed on the screen. For more information about changing the roster display, see "Changing the Information Displayed on Roster Pages" on page 113.

Classes > Class Roster

Actions Edit Help | Home | Log off |

Science 4 (4C)

Selected: 0 Total: 16

<input type="checkbox"/>	Student Name	Subject Name	HR	Gender	Ethnic Category
<input type="checkbox"/>	<a href="#">Bundick, Aaron</a>	Science 4	4C	M	N/A
<input type="checkbox"/>	<a href="#">Cathcart, Ameer</a>	Science 4	4C	F	N/A
<input type="checkbox"/>	<a href="#">Deacon, Theo</a>	Science 4	4C	M	N/A
<input type="checkbox"/>	<a href="#">Galaviz, Hedy</a>	Science 4	4C	F	N/A
<input type="checkbox"/>	<a href="#">Guthridge, Brent</a>	Science 4	4C	M	N/A
<input type="checkbox"/>	<a href="#">Hipple, Milo</a>	Science 4	4C	M	N/A
<input type="checkbox"/>	<a href="#">Kaminski, Clarence</a>	Science 4	4C	M	N/A
<input type="checkbox"/>	<a href="#">Maio, Velma</a>	Science 4	4C	F	N/A
<input type="checkbox"/>	<a href="#">Morrow, Jaquelyn</a>	Science 4	4C	F	N/A
<input type="checkbox"/>	<a href="#">Mowry, Wilfredo</a>	Science 4	4C	M	N/A
<input type="checkbox"/>	<a href="#">Nero, Jamar</a>	Science 4	4C	M	N/A
<input type="checkbox"/>	<a href="#">Samford, Gordon</a>	Science 4	4C	M	N/A
<input type="checkbox"/>	<a href="#">Spiers, Stanford</a>	Science 4	4C	M	N/A
<input type="checkbox"/>	<a href="#">Strong, Earnest</a>	Science 4	4C	M	N/A
<input type="checkbox"/>	<a href="#">Vandeusen, Lena</a>	Science 4	4C	F	N/A
<input type="checkbox"/>	<a href="#">Wisner, Connie</a>	Science 4	4C	M	N/A

To open a student record, click the student name.

## Viewing Homeroom Rosters

- 1 Log on as a school administrator.
- 2 In the control bar, under Class, click Homerooms.

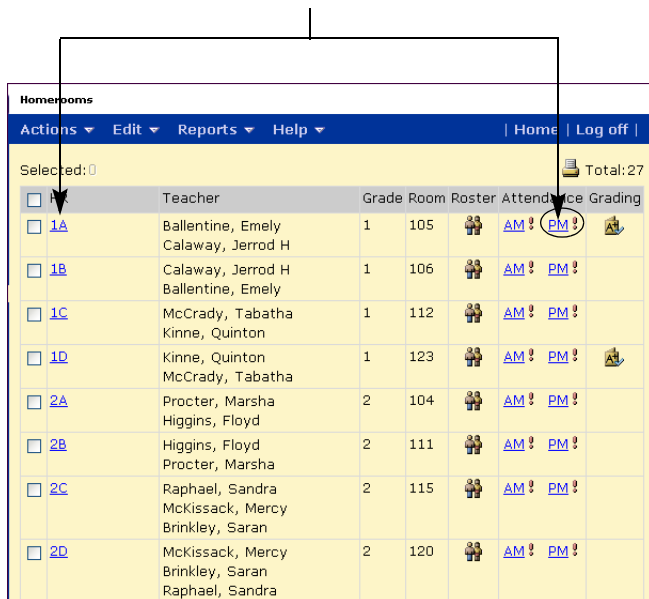












- 3** On the Homerooms page, click the homeroom you want to view.

OR

On the Homerooms page, click the Roster icon (  ) for the homeroom you want to view.

To view the homeroom roster,  
click the homeroom name or  
click the roster icon.






Homerooms						
Actions Edit Reports Help   Home   Log off						
Selected: 0 Total: 27						
	Teacher	Grade	Room	Roster	Attendance	Grading
<input type="checkbox"/>	1A Ballentine, Emely Calaway, Jerrod H	1	105		AM PM	
<input type="checkbox"/>	1B Calaway, Jerrod H Ballentine, Emely	1	106		AM PM	
<input type="checkbox"/>	1C McCrady, Tabatha Kinne, Quinton	1	112		AM PM	
<input type="checkbox"/>	1D Kinne, Quinton McCrady, Tabatha	1	123		AM PM	
<input type="checkbox"/>	2A Procter, Marsha Higgins, Floyd	2	104		AM PM	
<input type="checkbox"/>	2B Higgins, Floyd Procter, Marsha	2	111		AM PM	
<input type="checkbox"/>	2C Raphael, Sandra McKissack, Mercy Brinkley, Saran	2	115		AM PM	
<input type="checkbox"/>	2D McKissack, Mercy Brinkley, Saran Raphael, Sandra	2	120		AM PM	

On the Homeroom Roster page, you can change the information displayed on the screen. For more information about changing the roster display, see “Changing the Information Displayed on Roster Pages” on page 113.

## Changing the Information Displayed on Roster Pages

To assist you in adjusting homeroom and class rosters, you can change the student information displayed on class and homeroom roster pages. You can display incoming or withdrawn students and you can change the columns included on the page.

### To change the information displayed on the screen:

- 1 Log on as a school administrator.
- 2 Open a class or homeroom roster.  
For information about opening class rosters, see “Viewing Class Rosters” on page 111.  
For information about opening homeroom rosters, see “Viewing Homeroom Rosters” on page 112.
- 3 From the Edit menu, click Choose Columns > Class Search Results.
- 4 In the Available Columns list, select the columns you want to display, and then click  to move them to the Selected Columns list.
- 5 Use the  and  buttons to set the display order.
- 6 Click OK.

**To include withdrawn or incoming students:**

- 1 Log on as a school administrator.
- 2 Open a class or homeroom roster.

For information about opening class rosters, see "Viewing Class Rosters" on page 111.  
For information about opening homeroom rosters, see "Viewing Homeroom Rosters" on page 112.

- 3 From the Edit menu, click Include Incoming Students.

OR

From the Edit menu, click Include Withdrawn Students (current year).

## Modifying Homeroom and Class Rosters

At the beginning of the school year, finish your schedule by transferring students to correct homeroom, class, and subject assignments. You can adjust the rosters for all classes and subjects to incorporate team teaching or group students by ability. For more information about adjusting a roster at the beginning of the school year, see "Transferring Homerooms" on page 118.

During the school year, transfer students to assign them to a new class or subject, as required. For example, a group of students might take Music for the first half of the year and Art for the second half of the year. For more information about transferring students during the school year, see "Changing Class Rosters" on page 114.

## Changing Class Rosters

You can adjust class rosters in a planning calendar when you create the initial schedule. After school starts, you may need to adjust class rosters from time to time. For example, you may need to adjust a class roster to complete the following tasks:

- Assign walk-in students to a class.
- Find the best homeroom for a student and manually adjust a student's schedule.
- Schedule a student to receive or stop receiving resource services partway into the school year.
- Adjust a student's schedule based on individual student needs, such as moving a student to a faster or slower paced Math class. This change can be made at the start of the school year or partway through the school year.

**To add, drop, or transfer students:**

- 1 Log on as a school administrator.
- 2 Open a class roster.

For more information about opening class rosters, see "Viewing Class Rosters" on page 111.

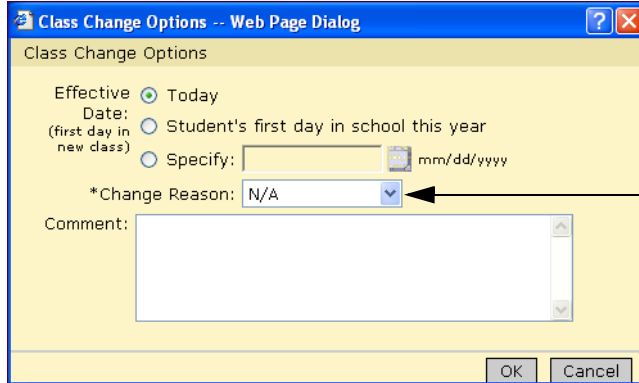
- 3** On the Class Roster page, do one of the following:

To	Do this
Add a student to the class	<ol style="list-style-type: none"> <li><b>1</b> From the Actions menu, click Add Student.</li> <li><b>2</b> In the Select Student dialog, select the students you want to add. Click OK.</li> </ol>
Drop a student from the class	<ul style="list-style-type: none"> <li>• Select the students you want to drop. From the Actions menu, click Drop Students.</li> </ul>
Transfer students to a different class	<ol style="list-style-type: none"> <li><b>1</b> Select the students you want to transfer.</li> <li><b>2</b> From the Actions menu, click Transfer Students.</li> <li><b>3</b> On the Transfer to Class page, select the class you want to transfer them into. Click OK.</li> </ol>

- 4** If you are working in the active calendar, in the Class Change Options dialog, specify the date you want these students to be added, enter a comment, and, if available, select a change reason. Click OK.

**NOTE**

If you set the effective date to “First Day of School” and manually drop or transfer classes from a student’s schedule, if you then create student schedules for all students, the dropped classes will be re-added to the student’s schedule. For more information about creating student schedules, see “Creating Student Schedules” on page 87. If you specify a specific date, even if the date is the same date as the first day of school, the classes are not re-added when you create student schedules.



In the active calendar, the Change Reason dropdown appears if change reasons are setup at the district. Change reasons may be required or optional.

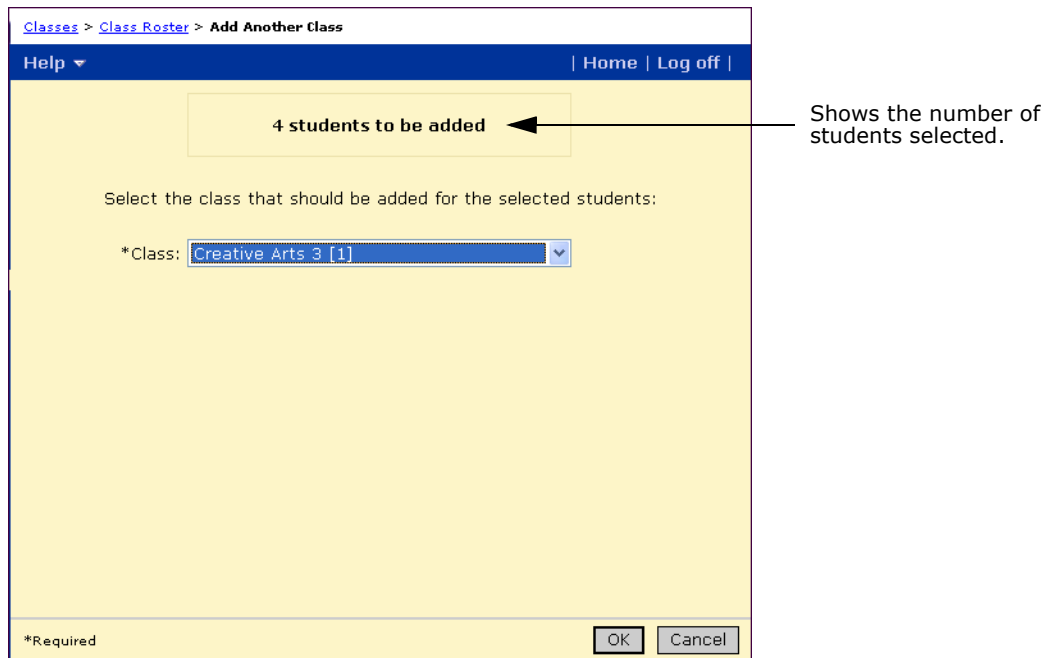
- 5** Click Save.

## Adding Groups of Students to Other Classes

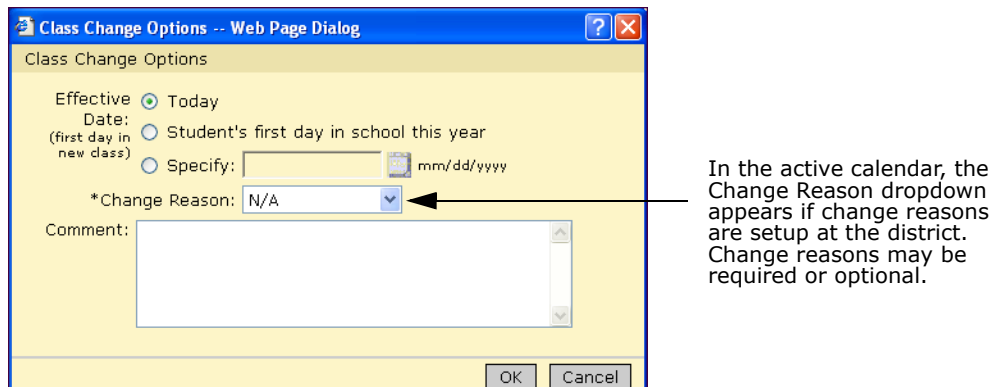
You can select a group of students and add them to several classes, one after another. For example, after you add students to the first term Music class, you can add the entire group of students to the second term Art class.

- 1** Log on as a school administrator.
- 2** Open a class roster.  
For more information about opening class rosters, see “Viewing Class Rosters” on page 111.
- 3** On the Class Roster page, select the students you want to add to another class.

- 4 From the Actions menu, click Add Another Class.



- 5 From the Class dropdown, select the class for these students. Click OK.
- 6 If you are working in the active calendar, in the Class Change Options dialog, specify the date you want these students to be added, enter a comment, and, if available, select a change reason. Click OK.



## Assigning Groups of Students to Classes

From Class rosters and Homeroom rosters, you can select a group of students and assign them to specific classes.

- 1 Log on as a school administrator.
- 2 Open a class or homeroom roster.

For more information about opening class rosters, see "Viewing Class Rosters" on page 111. For more information about opening homeroom rosters, see "Viewing Homeroom Rosters" on page 112.

- 3 On the Class or Homeroom roster, select the students you want to assign to classes.
- 4 From the Actions menu, click Assign > Classes.

The Assign Classes page opens.

Indicates the number of students whose schedules will be changed.

In the active calendar, you must specify the date you want changes to take effect.

In the active calendar, the Change Reason dropdown appears if change reasons are defined at the district. Change Reasons may be required or optional. The selected change reasons applies to all changes made on this page.

- 5 On the Assign Classes page, in the Class Search panel, search for and select the classes you want to add to or remove from the students' schedules.
- 6 If you are working in the active calendar, in Changes Effective, select the date you want to change to take effect.

#### NOTE

If you set the effective date to "First Day of School" and manually drop or transfer classes from a student's schedule, if you then create student schedules for all students, the dropped classes will be re-added to the student's schedule. If you specify a specific date (not the first day of school), the classes are not re-added. For more information about creating student schedules, see "Creating Student Schedules" on page 87.

- 7 If you are working in the active calendar and change reasons are set up at the district, in the Change Reasons dropdown, select a reason for the change.

**8** Click Add Class or Drop Class.

The added or dropped classes appear in the Add Classes or Drop Classes lists.

When you click Add Class, the selected classes are added to the Add Classes field.

When you click Drop Class, the selected classes are added to the Drop Classes field.

To transfer classes, add one class and drop one class then select Transfer.

**9** Click Apply.

## Transferring Homerooms

You can transfer students between homerooms from the Roster page. This method is particularly useful at the beginning of the school year when you are setting up schedules.

**To transfer students to different homerooms:**

- 1** Log on as a school administrator.
- 2** Open a homeroom roster.  
For more information about opening homeroom rosters, see “Viewing Homeroom Rosters” on page 112.
- 3** On the Roster page, select the students you want to assign to another homeroom. From the Actions menu, click Transfer Homeroom.

- On the Transfer Homeroom page, select the new homeroom you want to transfer the selected students to.

Homerooms > Roster > Transfer Homeroom

Help | Home | Log off |

6 students selected in grade 3.  
Select the homeroom to transfer to for these students. The following statistics do not include the selected students.

HR	Teacher	Grade	M	F	Total	1	2	3	4	5
<input type="radio"/> 3-A	Lee, Daniela	3	2	2	4	0	3	0	0	1
<input checked="" type="radio"/> 3-B	Paterson, Diane	3	7	3	10 !	1	5	0	0	3

Total: 2

! Capacity will be exceeded.

Ethnic Categories:  
 1) Asian    4) Native American  
 2) Black    5) White  
 3) Hispanic

OK Cancel

Check to see if the homeroom has enough space to accommodate the selected students.  
An exclamation mark indicates the homeroom does not have enough space to accommodate the selected students.

The numbers correspond to the Ethnic Categories.

- Click OK.
- If you are working in the active calendar, in the Change Options dialog, specify the date you want these students to be added, enter a comment, and, if available, select a change reason. Click OK.

Class Change Options -- Web Page Dialog

Class Change Options

Effective  Today

Date:  Student's first day in school this year  
 (first day in new class)  Specify:  mm/dd/yyyy

\*Change Reason: N/A

Comment:

OK Cancel

In the active calendar, the Change Reason dropdown appears if change reasons are set up at the district. Change reasons may be required or optional.





## Section 2: Secondary Scheduling

In secondary scheduling, students may be assigned to homerooms, but they usually only spend short periods of time in their homeroom. For each class, students go to different rooms with different groups of students. For secondary scheduling, you must set up the scheduling structure to define terms, day patterns, bell schedules, and meeting patterns. Based on student course requests and teacher preferences, Chancery SMS can generate teacher and student schedules, which can be printed and distributed to students and teachers.

### Permission to Work with Secondary Scheduling

To work with scheduling at a secondary school, you need the following permissions:

To	You need this permission	Set to
Assign classes to students, teachers and rooms	School Setup>Assign Classes	Yes
Assign courses to students	School Setup>Assign Course Requests	Yes
Create resource services	School Setup>Resource Services	Delete
Assign resource services to students	Students>Resource Assignments	Delete
Set up or change the school schedule	School Setup>Secondary Scheduling Setup	Yes
	School Setup>Subject Scheduling	Edit
View your school schedule	School Setup>Subject Framework/Course Catalog	View or Edit
	School Setup>Subject Scheduling	View or Edit
Add, edit, and delete buildings	Facilities Management>Buildings	Delete
	School Setup>Secondary Scheduling Setup	Yes
Add, edit, and delete rooms	Facilities Management>Rooms	Delete
	School Setup>Secondary Scheduling Setup	Yes
Create and schedule reservation labels	School Setup>Secondary Scheduling Setup	Yes
Create and edit meeting patterns	School Setup>Secondary Scheduling Structure Setup	Yes
Define class constraints.	School Setup>Define Constraints - School	Delete
Add, delete, or switch planning schedules	School Setup>Change Planning Schedule	Yes
Update scheduling statistics	School Setup>Change Planning Schedule	Yes
Create student schedules, including adding and removing course requests	Students>Edit Student Schedules	Yes
Schedule walk-in students	School Setup>Edit Student Schedules	Yes

## Chancery SMS Scheduling Guide

To	You need this permission	Set to
Assign default classes based on student homerooms	School Setup>Subject Scheduling	Edit, Delete, or None
	School Setup>Edit Student Schedules	Yes
Reassign default classes based on student homerooms	School Setup>Subject Scheduling	Edit, Delete, or None
	School Setup>Edit Student Schedules	Yes
Assign students to classes when doing so results in the class size exceeding the specified capacity	Classes - exceed capacity	Yes
Transfer grades from a dropped class to an added class	Grading>Transfer Grades and Attendance	Yes
	Students>Edit Student Schedules	Yes
Delete grades entered for a dropped class	Grading>Transfer Grades and Attendance	Yes
	Grading>Enter Grades for All Classes	Yes
	Grading>Edit Grades from Other Teachers	Yes
	Grading>Modify Grades for Completed Periods	Yes
	Students>Edit Student Schedules	Yes
Reassign attendance for transferred classes	Grading>Transfer Grades and Attendance	Yes
	Students>Edit Student Schedules	Yes
Delete attendance for dropped classes	Grading>Transfer Grades and Attendance	Yes
	School Setup>Clear Attendance	Yes
	Students>Edit Student Schedules	Yes
View grade transfers and attendance reassignments in the Audit Log	School Setup>View Audit Log	Yes

By default, the school administrator role can perform all scheduling setup tasks. For more information about permissions, see the Chancery SMS Permissions Guide and "Controlling User Access" in the Chancery SMS District Administration Guide.

## Typical Scheduling Scenarios of Secondary and Middle Schools

Secondary School	Middle School
School publishes required and elective course offerings.	School determines core courses that all students take. School determines exploratory courses that students rotate through. School might offer optional courses that students may request.
Students make course requests based on graduation plans and general interest.	School defines team loading rules for classes and teachers that keep groups of students together for some or all courses.
School determines the number of classes or sections for each course based on staffing and facilities.	
School builds master schedule to schedule classes into terms, meeting patterns, rooms, and teachers.	

## Typical Scheduling Timetable

For a school where the school year runs from September to June, the following is an example of when you might want to set up the course catalog and schedule students. If your school year runs on different dates, adjust the dates accordingly.

Be sure to also include the Next-Year Preparation and Year-End Processes in your scheduling timetable. For more information, see the Chancery SMS Next-Year Preparation and Year-End Processing Guide.

Time Period	Activity
January	Publish the school course catalog.
February to March	Enter student course requests. Distribute course request confirmations to students.
April	Build the master schedule. Load student schedules.
May to June	Distribute student schedules to students.
May to August	Manually adjust the master schedule in the planning calendar. Manually adjust student schedules in the planning calendar.
July to August	Perform Year-End Processing.
August to next June	Manually adjust student schedules in the active calendar. Manually adjust the master schedule in the active calendar.

Some scheduling tasks must be completed at the district before you can schedule your school. Make sure the following tasks are completed at the district:

- School boundaries for each school are correct for the coming school year and the Projected Schools Map matches these boundaries so that students' projected schools are correct in Chancery SMS.
- The start and end dates for the coming school year are defined.

- The course catalog for the coming school year is updated to include any new courses the district is offering.
- When the course catalog is updated, courses are assigned to each school so each school has its own updated course catalog.
- Projected schools for students are assigned and the Next-Year Preparation process is completed.

## Scheduling in Planning and Active Calendars

Although you will likely adjust the scheduling setup throughout the school year, most scheduling tasks are completed in the planning calendar. When you schedule your secondary school in the planning calendar, you likely follow distinct steps. These steps are represented on the Scheduling page to help you proceed through the scheduling process. For each step, the Scheduling page shows statistics that help you determine the current status of the step.

### NOTE

If the statistics do not seem correct, you can update statistics to refresh the calculations. For more information, see “Updating Statistics” on page 125.

In the planning calendar, the steps do not include any tasks that must be completed in the active calendar, such as setting up resource services.

The screenshot shows the 'Scheduling' page with a navigation bar (Actions, Reports, Help, Home, Log off) and a section titled 'Suggested steps for scheduling setup'. Below this, there is a dropdown menu for 'Setup common to all planning schedules for this school year' and a 'Planning Schedule' dropdown set to '2005-2006'. The main content area lists eight steps, each with a description and associated statistics. A 'Select Current' button is at the bottom.

Step	Description	Statistics
Step 1:	Configure scheduling aspects of rooms, staff & courses	0 rooms 0 teachers 0 courses assigned to school
Step 2:	Create one or more planning schedules:	
Step 3:	Set up the schedule structure	0 groups 0 term sets 5 regular and 0 special days 0 bell schedules 0 meeting patterns
Step 4:	Configure student loading rules	0 class rules 0 teams
Step 5:	Configure terms & meeting patterns for courses	0/0 courses with offerings configured
Step 6:	Create the school's master schedule	Over-allocation 0% 0/-3 students with requests 0/0 teachers allocated 0/0 classes scheduled
Step 7:	Load student schedules	Class overfill 0%; unscheduled request limit: 2 0/-3 students with full schedules
Step 8:	Select one planning schedule to become active when YEP is run	No planning schedule selected

Annotations on the screenshot:

- Left side: Planning Calendar Scheduling page includes scheduling steps available in the planning calendar.
- Right side: The right column displays statistics that show the status of each step.

When you work in the active calendar, the Scheduling page still displays the tasks as steps. However, when you work in the active calendar, the initial schedule is usually already set up and you do not need to follow the steps in order. You will likely revisit steps as required. In the active calendar, the Scheduling page does not include steps that only apply to the planning calendar, such as creating and selecting planning schedules.

**Scheduling**

Actions ▾ Reports ▾ Help ▾ | Home | Log off |

**Suggested steps for scheduling setup**

<b>Step 1:</b> Configure scheduling aspects of rooms, staff & courses	<a href="#">Room Setup</a> <a href="#">Staff Setup</a> <a href="#">Course Setup</a>	0 rooms 0 teachers 86 courses assigned to school
<b>Step 2:</b> Set up the schedule structure	<a href="#">Scheduling Groups</a> <a href="#">Scheduling Term Sets</a> <a href="#">Day Pattern</a> <a href="#">Bell Schedules</a> <a href="#">Meeting Patterns</a>	9 groups 3 term sets 2 regular and 1 special days 27 bell schedules 65 meeting patterns
<b>Step 3:</b> Configure student loading rules	<a href="#">Class Loading Rules</a> <a href="#">Team Loading Rules</a>	0 class rules 1 teams
<b>Step 4:</b> Configure terms & meeting patterns for courses	<a href="#">Course Offerings &amp; Meeting Patterns</a>	88/86 courses with offerings configured
<b>Step 5:</b> Create the school's master schedule	<a href="#">Class Scheduling Options</a> <a href="#">Course Request Tally</a> <a href="#">Teacher Allocations</a> <a href="#">Master Schedule</a>	Over-allocation 0% 242/~420 students with requests 2/0 teachers allocated 103/122 classes scheduled
<b>Step 6:</b> Load student schedules	<a href="#">Student Loader Options</a> <a href="#">Load Students</a>	Class overfill 0%; unscheduled request limit: 2 0/~420 students with full schedules
<b>Step 7:</b> Set up resource services	<a href="#">Resource Services</a> <a href="#">Resource Roster</a>	2 services configured 2 assignments for 2 students

In the Active Calendar, scheduling tasks are shown as steps although once the initial schedule is set up, you need not follow the steps in order.

The right column displays statistics that show the status of each step.

## Updating Statistics

Scheduling statistics indicate the status of the scheduling steps, such as allocating teachers and scheduling students. These statistics appear on the following pages: the Scheduling, Student Scheduling, Student Loader, and Course Request Tally pages. As you work through the steps for scheduling, these statistics may not refresh automatically. If the numbers do not seem correct, you can update the statistics.

### NOTE

Updating statistics may affect performance in Chancery SMS. It should not be necessary to update statistics as part of your regular processing. If statistics are frequently incorrect, contact technical support for assistance.

### To update statistics:

- 1 Log on as a school administrator at a secondary school.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, from the Actions menu, click Update Statistics.

**4** On the Update Statistics page, select the statistics you want to update:

Select	To update
Calendar Statistics	On the Scheduling page: <ul style="list-style-type: none"> <li>• Room Setup (# rooms)</li> <li>• Staff Setup (# teachers)</li> <li>• Course Setup (# courses assigned to school)</li> <li>• The total number of students used in Course Request Tally and Load Students statistics.</li> </ul>
Scheduling Statistics	On the Scheduling page: <ul style="list-style-type: none"> <li>• Scheduling Groups (# groups)</li> <li>• Scheduling Term Sets (# term sets)</li> <li>• Day Patterns (# days)</li> <li>• Bell Schedules (# bell schedules)</li> <li>• Meeting Patterns (# meeting patterns)</li> <li>• Class Loading Rules (# class rules)</li> <li>• Team Loading Rules (# teams)</li> <li>• Course Offerings and Meeting Patterns (# courses with offerings configured)</li> <li>• Class Scheduling Options (Overallocation # %)</li> <li>• Course Request Tally (# students with requests)</li> <li>• Teacher Allocations (# teachers allocated)</li> <li>• Master Schedule (# classes scheduled)</li> <li>• Load Students (# students with full schedules)</li> </ul>
Course Statistics	The Course Search options (Detail tab) on the Course Request Tally page
Student Requested Loads	On the Load Students page: Requested Load
Student Scheduled Loads	On the Load Students page: Scheduled Load
Potential Conflicts (between student requests)	Conflict Matrix page

**5** Click OK.

## Secondary Scheduling Overview

When working in the planning calendar, you generally follow a set of scheduling steps in the order shown on the Scheduling page. In the active calendar, you can perform most of the tasks available in the planning calendar in any order. In addition, you can define resource services and assign resource assignments, which cannot be done in a planning calendar. Although it is not necessary to perform tasks in a specific order in the active calendar, the Scheduling page still shows the available tasks as a series of steps. Setting up resource services is shown as Step 7. For most tasks, the description and procedures provided for the

planning calendar steps also apply to the tasks in the active calendar, except where differences are indicated. For more information about setting up resource services, see "Setting Up Resource Services (active calendar only)" on page 313.

The following steps describe the overall process of scheduling for secondary schools in the planning calendar:

### **Step 1 - Configure Scheduling Aspects of Rooms, Staff and Courses**

Although rooms, staff, and courses are generally set up when you set up your school, verify that they are set correctly and apply any scheduling requirements. See "Configuring Rooms, Staff, & Courses" on page 131.

### **Step 2 - Create Planning Schedules**

Planning calendar only.

If you are working in a planning calendar, you can create multiple planning schedules to try out different scheduling options. You can copy scheduling properties from the active calendar or from other planning calendars. For more information about creating grading tables, see "Using Planning Schedules" on page 165.

### **Step 3 - Set up Schedule Structure**

Set up the basic structure of your school schedule, including defining scheduling groups, scheduling term sets and scheduling terms, the day pattern, bell schedules, and meeting patterns. In the active calendar, this is step 2. For more information about schedule structures, see "Setting Up the Scheduling Structure" on page 171.

### **Step 4 - Configure Student Loading Rules**

Student loading rules allow you to ensure that specific courses are scheduled in a certain way, such as always being scheduled in sequence or to balance the schedule so that electives are not all scheduled in the same term. Chancery SMS uses two types of student loading rules: class loading rules and team loading rules. For more information about student loading rules, see "Configuring Student Loading Rules" on page 197.

### **Step 5 - Configure Terms and Meeting Patterns for Courses**

Assign default terms and meeting patterns to courses. Later, when you schedule teachers and students into courses, only those courses that have been assigned terms and meeting patterns are available for scheduling. For more information about assigning terms and meeting patterns to classes, see "Configuring Terms and Meeting Patterns for Courses" on page 223.

### **Step 6 - Create the School's Master Schedule**

In the planning calendar, you can build a master schedule for the school. The master schedule specifies how teachers are scheduled, analyses student course requests, and finally assigns teachers and rooms to classes. For more information about creating the school's master schedule, see "Creating the School Master Schedule" on page 265.

### **Step 7 - Load Student Schedules**

Run the student loader to automatically assign students to classes based on student course requests and the defined student loader rules. For more information about loading student schedules, see "Loading Student Schedules" on page 307.

**Step 8 - Select the planning schedule that will become active when YEP is run (planning calendar only)**

In the planning calendar, you can create multiple planning schedules to try out different scheduling options. When you run Year End Processing (YEP), only one planning schedule can be active. You must select the planning schedule you want to use before you run YEP. For more information, see “Selecting a Planning Schedule (planning calendar only)” on page 319.

## Understanding Chancery SMS Secondary School Scheduling Terminology

Before you begin the scheduling process at your school, it is important to understand the terminology Chancery SMS uses relating to courses and the course catalog, such as the difference between a period and a class, and how courses relate to both. The following definitions help you understand this terminology as it relates to Chancery SMS.

Term	Definition
Period	A time slot on a particular day in which a class may be held.
Class	A group of students that meets regularly to receive instruction in a course from a specific teacher. For example, Band 4 meets Tuesdays and Thursdays at 2 pm, with Mr. Bell providing instruction for 30 Grade 9 students. A class includes the following: <ul style="list-style-type: none"> <li>• course name and number</li> <li>• class name and number</li> <li>• at least one meeting pattern</li> <li>• at least one teacher</li> <li>• at least one room</li> <li>• students</li> </ul>
Course	A set of instructional topics and objectives taught to students for some duration of time (a full year, a semester, a six-week rotation, etc.).
Term set	A way to segment the school year. Within each term set is a number of terms. For example, you can have one term for the whole year or you can break up a year into two, three, or any number of terms. You can call the term sets semesters, trimesters, or any other name. You can define any number of term sets and any number of terms.
Day pattern	The cycle of days that your school uses. For example, your school can use a days-of-the-week pattern from Monday to Friday or it can use a relative-day pattern using a set number of days in a cycle, such as Day 1 to Day 4 in a four-day relative cycle.  You can add special days to your day pattern, such as parent-teacher interview days, professional development days, or early dismissal days.
Meeting pattern	A single period or series of periods when a class can meet. When you create the master schedule, classes are given one or more meeting patterns.



<b>Term</b>	<b>Definition</b>
Bell schedule	Consists of the start and end times of periods throughout the day. You can have a different bell schedule for each scheduling group and for different days.
Special scheduling day or exception day	A day that has a different bell schedule. For example, on parent-teacher interview days, afternoon periods may be excluded and students have a shorter instruction day.
Student schedule	The set of classes that a student is scheduled to attend.
Class schedule	The set of one or more terms, meeting patterns, teachers, and rooms in which a class is scheduled to meet.
Class roster	A list of all the students scheduled to attend a particular class.
Teacher schedule	The set of classes that a teacher is scheduled to teach.
Master schedule	The set of all classes that have been created for a school, with their associated terms, meeting patterns, teachers, and rooms.

Once you understand the terminology, the next step is to understand the interrelationship between periods, meeting patterns, courses, and classes.

A school determines how many classes of each course need to be offered in a given school year based on student course requests. These classes are scheduled into terms with meeting patterns, teachers, and rooms. All these elements form the school's master schedule.

For example, if you define a meeting pattern called MWF-A to meet in period 1 every Monday, Wednesday, and Friday, and assign MWF-A to the class Biology 12-1 then students who are assigned this class will have Biology 12-1 in those time slots on their schedules.

You can create classes to accommodate the number of students requesting, or assigned to, a course. For example, if there are 90 students with course requests for Computer Applications and you want to limit the class size to 15 students, you would create 6 classes.



# Configuring Rooms, Staff, & Courses

Rooms, staff, and courses are typically set up when you set up your school; however, it is a good idea to check the settings and make any necessary changes before scheduling your school.

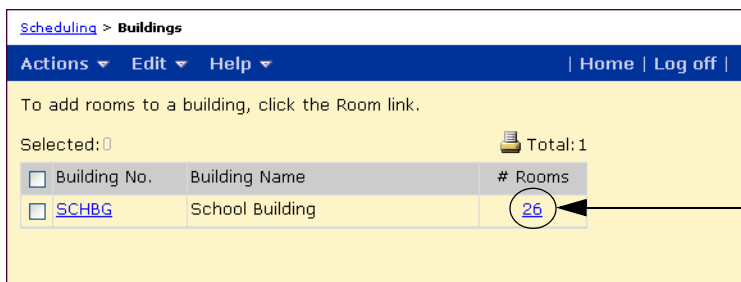
Although you can update staff and rooms in both the active and planning calendars, there is only one set of staff and one set of rooms that are used by both the active and planning calendars. Therefore, any changes you make to staff or rooms, whether in the active calendar or the planning calendar, affect the data in both calendars. Courses are assigned by the district and must be published for each calendar year. For further information, see the Chancery SMS District Administration Guide.

## Setting Up Rooms for Scheduling

Buildings and Rooms are generally set up when you set up your school. You can check the room set up from the Scheduling page so you can make any corrections before you schedule classes.

### To open the buildings page from the scheduling page:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 1, click Room Setup.
- 4 On the Buildings page, click the number in the # Rooms column.



To open the Rooms page, click the number in the # Rooms column.

- 5 On the Rooms page, do one of the following:

To	Do this
Add a room	<ul style="list-style-type: none"> <li>• From the Actions menu, click Add Room.</li> </ul>
Edit a room	<ul style="list-style-type: none"> <li>• Select a room. From the Actions menu, click Edit Room.</li> </ul> <p>OR</p> <p>In the Room No. column, click the room number.</p>
Delete a room	<ol style="list-style-type: none"> <li>1 Select the room.</li> <li>2 From the Actions menu, click Delete Room.</li> </ol> <p>Skip the remaining steps.</p>

- 6 On the Add Room or Edit Room page, enter or edit the information about the room.  
For more information, see "Setting Up Buildings and Rooms" in the Chancery SMS School Setup Guide.

## Setting Up Staff for Scheduling

Staff records are generally created when you set up your school properties. When you begin scheduling classes, you may want to review and modify staff records and specify properties used for scheduling, such as teacher scheduling load and time restrictions. You can also create “placeholder” teachers to account for staff expected to be added for the next school year. In the planning calendar, when you allocate teachers, the Master Schedule Builder uses these properties to schedule teachers.

For more information about creating and maintaining staff records, see “Setting Up Staff Records” in the Chancery SMS School Setup Guide.

Staff scheduling defaults that define a full-time teaching load must be set at the district to enable school users to set the staff scheduling properties for individual teachers. Once the defaults have been set, the values are reflected in the records of individual staff members. The values can then be adjusted at the school level as required, and the following staff scheduling properties can be set to facilitate automated scheduling:

- Scheduling load
- Course and room preferences
- Time restrictions

### NOTE

The scheduling load for a teacher is a numeric value that determines how many courses a teacher should be scheduled to teach based on course scheduling loads. The course scheduling loads are values assigned to individual courses, usually based on the number of hours of instruction. For example, the district could set course scheduling loads at 1.0 for courses that meet six hours a week over one term, and 0.5 for courses that meet three hours a week for one term. A teacher with a scheduling load of 4.0 would have to teach four courses worth 1.0 or eight courses worth 0.5 (or any combination that adds up to the same value) to be considered full-time.

## Setting Staff Scheduling Properties

Use Chancery SMS to define scheduling properties for individual teachers at the school level. These properties define the teacher’s scheduling load for each term, and include course preferences, room preferences, and time restrictions to be taken into consideration during scheduling.

Enter course preferences for teachers who only teach specific courses. Enter room preferences so Master Schedule Builder will attempt to assign teachers to specific rooms. Enter time restrictions for part time teachers who are not available for specific days or times.

### NOTE

Course preferences, room preference, and time restrictions are set only for staff members who can be scheduled to teach courses. For school administrators, secretaries, and teachers on leave-of-absence, do not enter this information.

### To set staff scheduling properties:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 1, click Staff Setup.

- 4 On the Scheduling Staff List page, search for a specific staff record or click All Staff or All Placeholders.

The screenshot shows the 'Scheduling > Scheduling Staff List' page. At the top, there is a navigation bar with 'Actions', 'Edit', and 'Help' menus, and 'Home' and 'Log off' links. Below this is a 'Staff Search' section with a 'Search by:' dropdown set to 'Last name' and an empty search input field. There are 'Search', 'All Staff', and 'All Placeholders' buttons. Below the search section is a 'Staff Search Results' section. It shows 'Selected: 0' and 'Total: 0'. A table header is visible with columns for 'Name', 'Staff ID', and 'User ID'. Below the header, it states 'There are no records in this list.'

- 5 Under Staff Search Results, click the staff member name.
- 6 On the Staff Scheduling Properties page, expand the Teaching Load panel.
- 7 For Scheduling Load, select District Default to use the default set by the district (shown in parentheses) or select Override to specify a value different from the district default.

**NOTE**

You cannot set the scheduling load to zero.

The screenshot shows the 'Teaching Load' panel. It contains two sections. The first section is 'Scheduling Load' with two radio buttons: 'District default (8.0000)' (which is selected) and 'Override' with an empty input field. The second section is 'Maximum students' with two radio buttons: 'District default (140)' and 'Override' with an input field containing the value '125'.

- 8 Expand the Course Preferences panel.

**9** Do one of the following:

To	Do this
Add a preferred course by searching for courses	<ol style="list-style-type: none"> <li>1 Perform a Basic or Detail search.</li> <li>2 From the Search Results, select the courses.</li> <li>3 Click Add.</li> </ol>
Add specific courses by entering course numbers	<ol style="list-style-type: none"> <li>1 In the Course Number field, enter the course numbers.</li> <li>2 Enter multiple course numbers separated by commas.</li> <li>3 Click Add.</li> </ol>

Use the course search options to search for specific courses. Select courses in the search results and click Add.

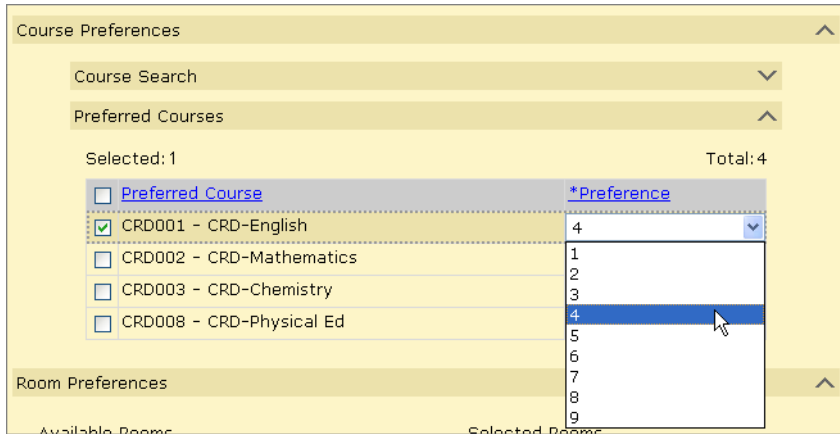
To add specific courses by course number, enter course numbers separated by commas. Click Add.

Selected:	Total:
<input type="checkbox"/> Preferred Course	*Preference
<input type="checkbox"/> CRD001 - CRD-English	4
<input type="checkbox"/> CRD002 - CRD-Mathematics	1

**10** Under Preferred Courses, select a course and, in the Preference dropdown, select the preference level. Repeat for each preferred course.

**NOTE**

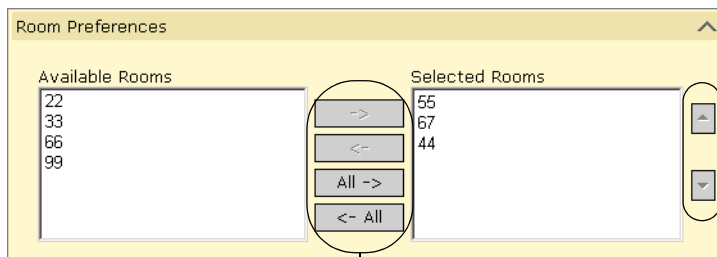
Preference levels range from 1 to 9, with 1 being the highest. Master Schedule Builder does not automatically schedule any course with a preference of 9, so this preference level can be used to denote courses that are to be scheduled manually. The default preference is 5.



**11** Expand the Room Preferences panel.

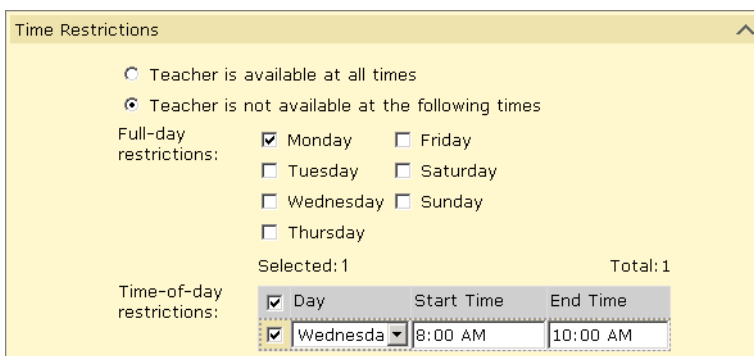
**12** In the Available Rooms list, double-click or use the arrows to move selected rooms to the Selected Rooms list.

In the Selected Rooms list, the order of the rooms indicates the preference priority. If required, use the up and down arrows to organize selected rooms in order of preference.



To add a room to the preferred room list, select a room in the Available rooms list and then click the -> button.

**13** Expand the Time Restrictions panel.



**14** Do one of the following:

To	Do this
Indicate that the teacher is available for scheduling during all regular school hours	<ul style="list-style-type: none"> <li>Select "Teacher is available at all times".</li> </ul>
Indicate that the teacher is not available for scheduling on specific days	<ol style="list-style-type: none"> <li>Select "Teacher is not available at the following times".</li> <li>Under Full-day Restrictions, select the days the teacher is unavailable.</li> </ol> <p><b>NOTE</b> If your school uses relative days, do not enter teacher time restrictions.</p>
Indicate that the teacher is not available for scheduling at specific times	<ol style="list-style-type: none"> <li>Select "Teacher is not available at the following times."</li> <li>From the Actions menu, click Add Time Restriction. Select the Day, Start Time, and End Time for the restriction.</li> <li>Select the checkbox for the new time-of-day restrictions.</li> </ol> <p><b>NOTE</b> If your school uses relative days, do not enter teacher time restrictions.</p>
Remove a time restriction	<ol style="list-style-type: none"> <li>Under Time-of-Day Restrictions, select the restriction you want to remove.</li> <li>From the Actions menu, click Delete Time Restriction.</li> <li>Click OK.</li> </ol>

**15** Click OK.

## Creating Placeholders for Scheduling

Use Chancery SMS to create a placeholder for scheduling purposes. This feature is used when courses need to be scheduled, but a specific teacher is not yet available to assign because hiring is not complete. In this situation, a placeholder is created with the appropriate preferences and restrictions, and this placeholder record is used in lieu of an actual staff member to complete the schedule.

**To create placeholder teachers:**

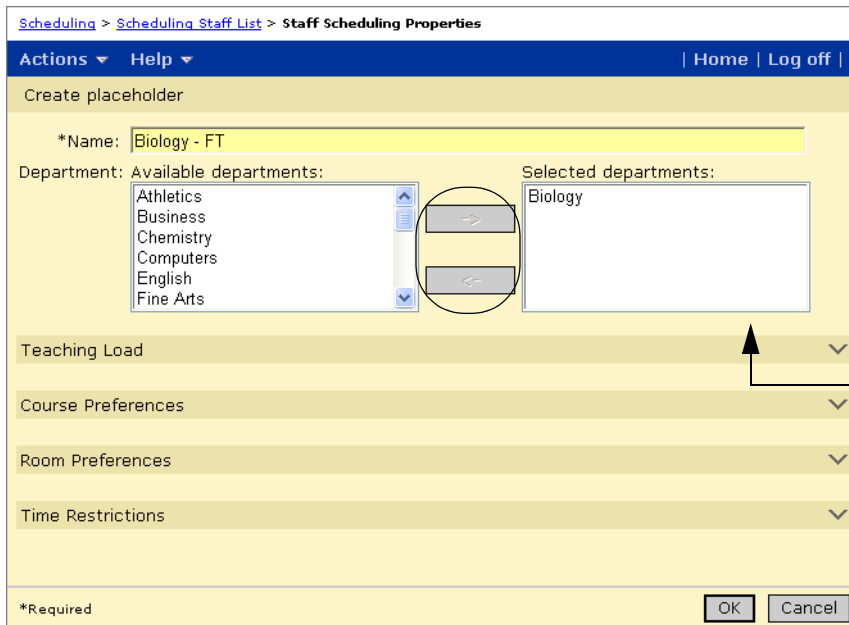
- Log on as a school administrator.
- In the control bar, under Admin, click Scheduling.
- On the Scheduling page, under Step 1, click Staff Setup.
- On the Scheduling Staff List page, from the Actions menu, click Create Placeholder.
- On the Staff Scheduling Properties page, in the Name field, enter a name for the placeholder.

**NOTE**

Placeholders are given a one-word name that functions as a last name for search purposes.



- 6 In Departments, from the Available Departments list, select the departments the placeholder is available for and move them to the Selected Departments list.



Select departments and use the arrows to move them between the Available Departments and Selected Departments lists.

- 7 Expand the Teaching Load panel.
- 8 For Scheduling Load, select District Default to use the default set by the district (shown in parentheses) or select Override to specify a value different from the district default.

**NOTE**

You cannot set the scheduling load to zero.

- 9 Expand the Course Preferences panel and do one of the following:

To	Do this
Add a preferred course by search for courses	<ol style="list-style-type: none"> <li>1 Perform a Basic or Detail search.</li> <li>2 From the Search Results, select the courses.</li> <li>3 Click Add.</li> </ol>
Add specific courses by entering course numbers	<ol style="list-style-type: none"> <li>1 In the Course Number field, enter the course numbers. Enter multiple course numbers separated by commas.</li> <li>2 Click Add.</li> </ol>

- 10 Under Preferred Courses, select a course and, in the Preference dropdown, select the preference level. Repeat for each preferred course.

**NOTE**

Preference levels range from 1 to 9, with 1 being the highest. Master Schedule Builder does not automatically schedule any course with a preference of 9, so this preference level can be used to denote courses that are to be scheduled manually. The default preference is 5.

- 11 Expand the Room Preferences panel.

- 12** In the Available Rooms list, double-click or use the arrows to move selected rooms to the Selected Rooms list.

In the Selected Rooms list, the order of the rooms indicates the preference priority. If required, use the up and down arrows to organize selected rooms in order of preference.

- 13** Expand the Time Restrictions panel and do one of the following:

To	Do this
Indicate that the placeholder is available for scheduling during all regular school hours	<ul style="list-style-type: none"> <li>Select "Teacher is available at all times".</li> </ul>
Indicate that the placeholder is not available for scheduling on specific days	<ol style="list-style-type: none"> <li>Select "Teacher is not available at the following times".</li> <li>Under Full-day Restrictions, select the days the placeholder is unavailable.</li> </ol> <p><b>NOTE</b> If your school uses relative days, do not enter teacher time restrictions.</p>
Indicate that the placeholder is not available for scheduling at specific times	<ol style="list-style-type: none"> <li>Select "Teacher is not available at the following times."</li> <li>From the Actions menu, click Add Time Restriction. Select the Day, Start Time, and End Time for the restriction.</li> <li>Select the checkbox for the new time-of-day restrictions.</li> </ol> <p><b>NOTE</b> If your school uses relative days, do not enter teacher time restrictions.</p>
Remove a time restriction	<ol style="list-style-type: none"> <li>Under Time-of-Day Restrictions, select the restriction you want to remove.</li> <li>From the Actions menu, click Delete Time Restriction.</li> <li>Click OK.</li> </ol>

- 14** Click OK.

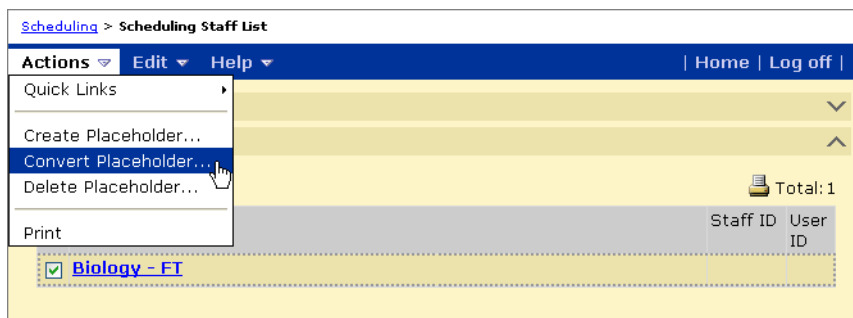
## Converting Placeholders to Staff Members

Use Chancery SMS to convert an existing placeholder to a staff member and transfer all the placeholder's scheduling properties to the staff record. This is used when a staff member is hired to teach the courses previously scheduled using the placeholder record. When the record is converted, the new staff member record adopts the preferences and restrictions from the placeholder and takes its place in the schedule. The placeholder record is then deleted.

### To convert a placeholder record to a staff member record:

- Log on as a school administrator.
- In the control bar, under Admin, click Scheduling.
- On the Scheduling page, under Step 1, click Staff Setup.
- On the Scheduling Staff List page, search for a specific staff record or click All Placeholders.
- Under Staff Search Results, select the placeholder record.

- 6 From the Actions menu, click Convert Placeholder.



- 7 On the Convert Placeholder Teacher to Staff Member page, search for a specific staff record or click All Staff.
- 8 Under Staff Search Results, select the staff member record to substitute for the placeholder record.
- 9 Click OK.

## Deleting Teacher Course Preferences

Master Schedule Builder schedules teachers based on their course preferences. To indicate that a teacher cannot be scheduled by automated scheduling processes, remove all their course preferences.

### NOTE

Teachers without course preferences can still be manually scheduled.

### To make teachers ineligible for scheduling:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 1, click Staff Setup.
- 4 On the Scheduling Staff List page, search for a specific staff record or click All Staff or All Placeholders.
- 5 Under Staff Search Results, click the staff member name.
- 6 On the Staff Scheduling Properties page, expand the Course Preference panel.
- 7 Under Course Preferences, do one of the following:

To	Do this
Select all course preferences	<ul style="list-style-type: none"> <li>• Select the checkbox in the Preferred Courses heading.</li> </ul>
Select specific course preferences	<ul style="list-style-type: none"> <li>• Select the checkbox for the specific course preferences.</li> </ul>

- 8 From the Actions menu, click Delete Preferred Course. Click OK to confirm.
- 9 Click OK.

## Setting Up Courses

Schools that use the secondary school scheduling method use courses for scheduling.

The course catalog and its courses are set up at the district. The courses are then assigned to schools. Even though the district can assign the same course to multiple schools, each school has its own list of courses.

### NOTE

Courses must be assigned and published for schools for each calendar year. Courses in the school active calendar are not automatically available in the school planning calendar. If courses are not available in the planning calendar, contact your district administrator.

At the school, you can assign room types or room preferences to courses. If you want to change other settings for courses, contact your district administrator.

## Searching for Courses

A Course Search panel is available on several pages and enables you to find specific courses. The following table shows the pages that include a Course Search panel and how to navigate to the page:


Page	Navigation
Course List	School Setup > Courses Scheduling > Course Setup Scheduling > Course Offerings and Meeting Patterns Grading > Courses District Setup > Course Catalog > Courses
Course Request Tally	Scheduling > Course Request Tally
Teacher Allocations	Scheduling > Teacher Allocations
Master Schedule	Scheduling > Master Schedule
Student Schedule	Student Demographics > Schedule

The Course Search panel provides two ways to search for courses: Basic and Detail.

A Basic search allows you to enter up to three search criteria and the search results return records that match all specified criteria. A Detail search provides more flexibility. You can define multiple criteria and then specify whether records must match all the specified criteria or any of the criteria.

**To open the Course Search panel:**

- Navigate to a page that has a Course Search panel, such as the Course List page, and expand the Course Search panel.

To expand the Course Search panel, click .

**To use previously defined search criteria:**

- 1 Navigate to a page that has a Course Search panel.
- 2 From the List dropdown, select the search criteria you want to use.

**Performing a Basic Course Search**

In a Basic course search, you can enter up to three search criteria and returned records match all defined criteria.

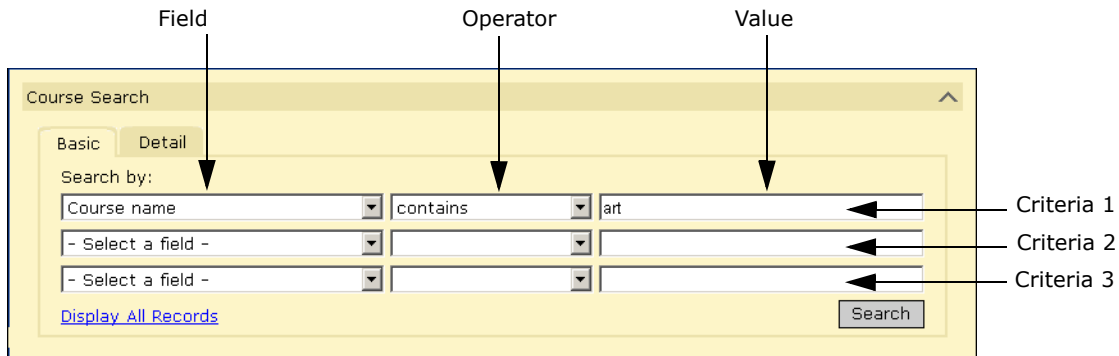
Each criteria has three parts:

- a field name
- an operator
- a value

The following criteria finds courses whose name contains the word "art" and would find AP Art, AP Language Arts, Honors Language Arts 10, and so on.

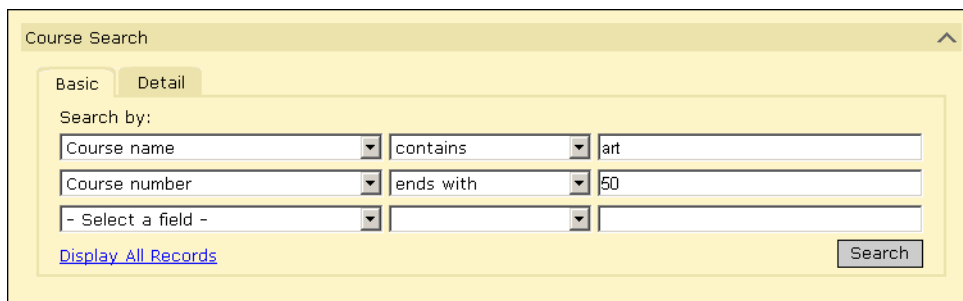
- Field Name = Course Name
- Operator = Contains

- Value = art



Add the following criteria to find courses whose name contains the word “art” AND whose course number ends with “50”.

- Field Name = Course Number
- Operator = Ends with
- Value = 50



**To perform a Basic search:**

- 1 Navigate to a page with a Course Search panel and expand the Course Search panel.
- 2 From the left dropdown in the first row, select a field name.
- 3 From the middle dropdown in the first row, select an operator.

Operator	Finds records where the field...
Contains	Includes the value anywhere in the field
Does not equal	Is anything but the value
Ends with	Ends with the value
Equals	Exactly matches the value
Is empty	Does not contain a value
Is not empty	Contains any value
Starts with	Starts with the value

- 4 In the right field in the first row, enter a value, if applicable.

- 5 Repeat Steps 2 to 4 for the second and third rows (optional).
- 6 Click Search.

## Performing a Detail Course Search

In a Detail course search, you can enter multiple search criteria and specify whether returned records match all defined criteria or any defined criteria.

Each criteria has three parts:

- a field name
- an operator
- a value

The following criteria finds courses whose name contains the word "art" and would find AP Art, AP Language Arts, Honors Language Arts 10, and so on.

- Field Name = Course Type
- Operator = Equals
- Value = Academic

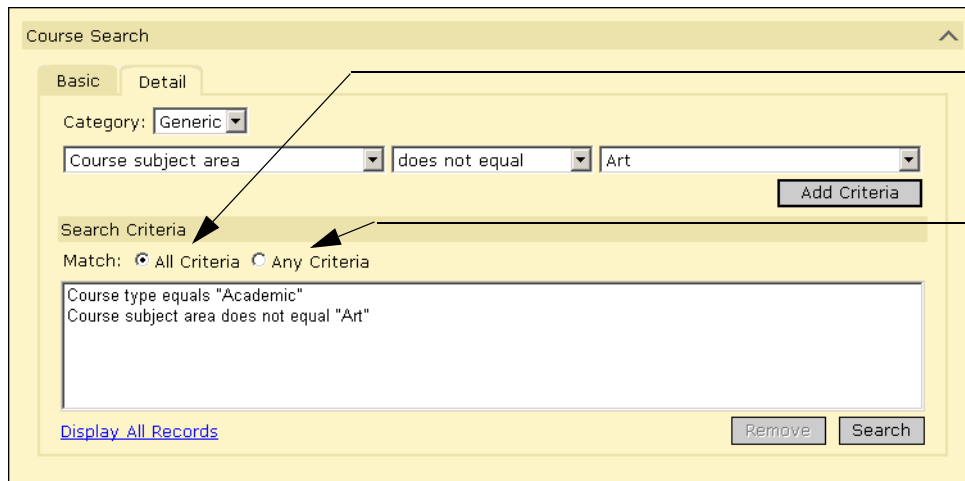
The screenshot shows the 'Course Search' window with the 'Detail' tab selected. The 'Category' is set to 'Generic'. A search criteria is defined with the following components:

- Field Name:** Course type
- Operator:** equals
- Value:** Academic

The 'Add Criteria' button is visible next to the criteria definition. Below the definition, the 'Search Criteria' section shows the match type set to 'All Criteria'. A list of 'Selected Criteria' contains one entry: 'Course type equals "Academic"'. At the bottom of the window, there are buttons for 'Display All Records', 'Remove', and 'Search'.

Add the following criteria to find courses whose course type equals "academic" AND whose course subject area does not equal "art".

- Field Name = Course subject area
- Operator = Does not equal
- Value = art



To search for courses whose type is "academic" AND whose subject area is not "art", select All Criteria.

To search for courses whose type is "academic" OR whose subject area is not "art", select Any Criteria.

**To perform a Detail search:**

- 1 Navigate to a page with a Course Search panel and expand the Course Search panel.
- 2 Click the Detail tab.
- 3 From the left dropdown in the first row, select a field name.
- 4 From the middle dropdown in the first row, select an operator.

Operator	Finds records where the field...
Contains	Includes the value anywhere in the field
Does not equal	Is anything but the value
Ends with	Ends with the value
Equals	Exactly matches the value
Is empty	Does not contain a value
Is not empty	Contains any value
Starts with	Starts with the value


- 5 In the right field in the first row, enter or select a value from the dropdown, if applicable.
- 6 Click Add Criteria.
- 7 To add more criteria to your search, repeat Steps 2 to 5 (optional).
- 8 Select whether you want your search to match All Criteria or whether you want to match Any Criteria.

To remove a criteria from the search, highlight the criteria and click Remove.



**9** Click Search.

The Search Results page displays a list of possible matches. If there are many courses, you may need to scroll or click Prev/Next to find the course you're looking for.

If you're not satisfied with your search results, click  to open the Search Criteria panel, modify your search criteria then click Search.

## Displaying Inactive Courses

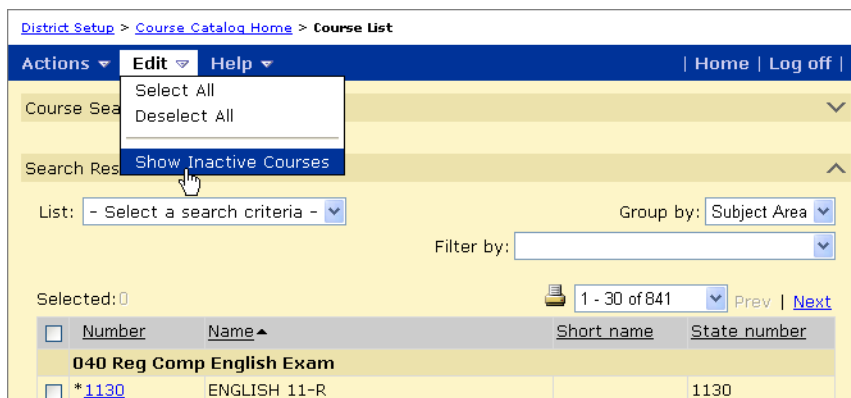
Courses are set as active or inactive at the district. You can include inactive courses in the course list. If you need to change the inactive status of a course, contact your district administrator.

### NOTE

When a course is made active, it is active for all schools in the district that are assigned that course.

### To display inactive courses:

- 1** Log on as a school administrator.
- 2** In the control bar, click District Setup.
- 3** On the District Setup page, under District, click Course Catalog.
- 4** On the Course Catalog page, under Step 3, click Courses.
- 5** From the Edit menu, select Show Inactive Courses.



## Reviewing Course Scheduling Properties

Most course scheduling properties are set at the district. You can review the properties associated with courses on the Course Scheduling page. At the school, you can also specify room preferences for courses. Master Schedule Builder uses the settings on this page to build the schedule for your school.

### To display course scheduling information:

- 1** Log on as a school administrator.
- 2** In the control bar, click Scheduling.
- 3** On the Scheduling page, under Step 1, click Course Setup.

- 4 On the Course List page, select the courses you want to review. From the Actions menu, click Edit Course Scheduling.

The screenshot shows the 'Course Scheduling' page for 'CRD-English'. It features a navigation bar with 'Help', 'Home', and 'Log off'. Below the course name, there are 'Prev' and 'Next' buttons and a 'Copy' link. The main content is divided into three sections: 'General Scheduling', 'Prerequisites & Corequisites', and 'Rooms'. The 'General Scheduling' section contains input fields for '\*Scheduling load: 1.0000', '\*Maximum students: 25', '\*Minimum students: 15', and '\*Optimal students: 20'. The 'Prerequisites & Corequisites' section has two empty tables for 'Prerequisites' and 'Corequisites'. The 'Rooms' section includes a 'Room required' checkbox and two radio buttons for 'Preferred room types' and 'Preferred rooms'. Each radio button has associated selection tools for moving items between 'Available' and 'Selected' lists. At the bottom, there are 'Save' and 'Reset' buttons and a '\*Required' label.

The following table describes the information displayed on the Course Scheduling page:

Field or Section	Description
<b>General Scheduling section</b>	
Scheduling load	<p>This value is summed with the scheduling load values for other courses that a student requests to determine whether the student has a full course load for the year.</p> <p>This field is also used to determine a teacher’s scheduling load.</p> <p>The total scheduling load for a student or teacher cannot exceed 99.99. If you set the scheduling load for course to 1.0, students could take 99 courses before they reach the maximum allowed. If you set the scheduling load for courses to 20, students could only take four courses before they reach the maximum allowed.</p>

Field or Section	Description
Maximum Students Minimum Students Optimal Students	<p>The maximum, minimum, and optimal number of students that the class for this course should have.</p> <p>The values set at the district for this course become the initial values for these fields at the school.</p> <p>Schools can change these values on the Scheduling &gt; Course Request Tally page by selecting these columns from Edit &gt; Choose columns. Using the Course Request Tally page to change these fields only affects the planning schedule in which the change is made. It does not affect other planning schedules, other schools, or the district.</p>
<b>Prerequisites &amp; Corequisites section</b>	
Prerequisites and corequisites	Specifies the course prerequisites and corequisites set by the district.
<b>Rooms section</b>	
Room Required	<p>If a room is required, select either Preferred room types or Preferred rooms.</p> <p>If you select Preferred rooms, you can select one or more preferred rooms.</p> <p>Select the rooms in the Available list and move them to the Selected list. Then use the up and down arrow buttons to set the order of preference. The first room in the Selected list is the highest preference, and so on.</p> <p>If you select Preferred rooms, you must also choose one or more alternate room types that can be used if the preferred rooms are not available.</p>
Copy	<p>When you are setting up courses, you can use the Copy link to the right of the section heading to copy course information and just change the fields that are different.</p> <p>You can copy course information that is available in the planning calendar. In the active calendar, you can only copy course grading and course offerings information.</p>

**5** Click Save.

**To display course details:**

- On the Course Scheduling page, in the control bar, click Course Details.

The Course Detail page shows the following fields:

Field or Section	Description
Course Number	<p>The course number must be unique; no two courses in the entire district can have the same course number.</p> <p>You can include alphabetic characters in the course number, such as 101A.</p>
Course State Number	If required, enter the state-assigned course number.
Course Name	Enter the course name.
Course Short Name	Enter a short name of up to 10 characters.

Field or Section	Description
Course Alternate Name	If you wish, enter an alternate name.
Course Description	Enter the course description.
Course Subject Area	Select the subject area that has been set up in Chancery SMS Subject Area.
Course Type	Select the course type that has been set up in Chancery SMS Course Type.
Department	Select the department that has been set up in Chancery SMS Department.
Course Is	Specify whether the course is required, an elective, or a study hall course. Study hall courses cannot collect grades.
Collect Attendance	If attendance is not collected for this course, such as some study halls, deselect this checkbox.

## Assigning Rooms to Courses

You can indicate that a course requires a room and specify preferred room types or specific rooms. When classes are created for the course, the classes are assigned to the rooms based on the preferred room or room type.

### To assign rooms to courses:

- 1 Log on as a school administrator.
- 2 In the control bar, click Scheduling.
- 3 On the Scheduling page, under Step 1, click Course Setup.
- 4 On the Course Setup page, select the courses you want to assign to rooms. From the Actions menu, click Edit Course Scheduling.

- 5 On the Course Scheduling page, under Rooms, select Room Required.

Scheduling > Course List > Course Scheduling

Actions Help | Home | Log off |

English I

Rooms

Room required

Classes may be held in:

Preferred room types

Available room types: \*Selected room types: Total:1

Art Room  
Band Hall  
Biology Lab  
Cafeteria  
Chemistry Lab  
Computer Lab  
Counseling Room

Classroom

Preferred rooms

Available rooms: \*Selected rooms: Total:0

If preferred rooms are not available, use the following room types.

Available room types: \*Selected room types: Total:0

\*Required Save Reset

- 6 Select Preferred Room Type and, from the list of available room types, select the preferred room types and move them to the Preferred Room Types list. Use the up and down arrows to set the order of preference.

OR

Select Preferred Rooms and, from the list of available rooms, select the preferred rooms and move them to the Preferred Rooms list. Use the up and down arrows to set the order of preference. Then, choose one or more alternate room types that can be used if the preferred rooms are not available.

- 7 Click Save.

## Reserving Periods in Student, Teacher, or Room Schedules

Reservation labels are used at secondary schools to reserve periods for teachers, students, and rooms. Reservation labels are similar to courses and use the course scheduling framework. You can assign reservation labels manually using the walk-in scheduler and Master Schedule Builder or allow the Master Schedule Builder or Student Loader to assign them automatically based on teacher preferences and student course requests.

### NOTES

Reservation labels do not have course numbers and do not collect grades or attendance.

Data mapping does not copy reservation labels and Reservation labels are not copied to the planning calendar during Next-Year Preparation.

You can use any of the following three types of reservation labels:

Type	Description
Teacher	<p>Use teacher reservation labels to reserve times in teacher schedules for activities such as preparation periods or lunch monitoring. Teacher reservation labels are not available for students to request and cannot be assigned to students. For more information about how to use teacher reservation labels, see the following examples:</p> <ul style="list-style-type: none"> <li>• “Manually Assigning Teacher Preparation Periods - Example” on page 152.</li> <li>• “Automatically Assigning Teacher Preparation Periods - Example” on page 154.</li> </ul> <p><b>NOTE</b> Although similar to teacher time restrictions, teacher reservation labels are tied to the scheduling structure and are used for reserving specific periods for class preparation, lunch monitoring, and so on. Teacher time restrictions are not tied to a specific schedule and are used for indicating when part time teachers are available. Time restrictions do not print on teacher schedules, while reservation labels can be printed on schedules.</p>
Student	<p>Use student reservation labels to assign early or late starting times for schools that use extended days or to reserve specific periods to accommodate student extracurricular activities. You can also use student reservation labels to reserve times for both teachers and students for activities such as tutoring or counseling sessions. For more information about how to use student reservation labels, see the following examples:</p> <ul style="list-style-type: none"> <li>• “Automatically Assigning Students to Early or Late Starting Times - Example” on page 156.</li> <li>• “Manually Assigning Students to Early or Late Start Times - Example” on page 159.</li> <li>• “Setting Up Reservation Labels for Student/Teacher Meetings - Example” on page 161.</li> </ul>
Room	<p>Use Room reservation labels to reserve rooms without assigning teachers or students to the room, for example, to be used by an outside group.</p>

## Creating Reservation Labels

Reservation labels are created at the school level to give schools the flexibility to create reservation labels, as required. Once created, reservation labels can be scheduled in the same way as other courses.

**NOTE**

You cannot collect attendance or grades for reservation labels.

**To create a reservation label:**

- 1** Log on as a school administrator.
- 2** In the control bar, under Admin, click Scheduling.
- 3** On the Scheduling page, under Step 1, click Course Setup.

- 4 On the Course List page, from the Actions menu, click Add Reservation Label. The Add/Edit Reservation Label page opens.

- 5 On the Add Reservation Label page, enter the necessary information:

Field	Description
Name	Enter a name for the reservation label of up to 99 characters.
Short Name	Enter an abbreviated name of up to 11 characters. The short name is displayed on screen and in reports. <b>NOTE</b> The reservation label short name is also used as the reservation label course number.
Type	Select the type of reservation label. <ul style="list-style-type: none"> <li>• Teacher - the reservation label can be assigned to teachers only.</li> <li>• Student - the reservation label can be assigned to students, teachers, and rooms.</li> <li>• Room - the reservation label can be assigned to rooms only.</li> </ul> <b>NOTE</b> Once the reservation label type is set, it cannot be changed.
Scheduling Load	Specify the scheduling load associated with the reservation label. If the reservation label does not affect the teaching load for teachers or class load for students, you can leave this value as zero.
Max. Students	For Student reservation label types only. Enter the maximum number of students that can be assigned to an instance (like a class) of this reservation label. 1-999.
Min. Students	For Student reservation label types only. Enter the minimum number of students that can be assigned to an instance of this reservation label. 1-999.

Field	Description
Opt. Students	For Student reservation label types only. Enter the optimal number of students that can be assigned to an instance of this reservation label. 1-999.
Print on Reports	If selected, the reservation label is printed on reports, such as teacher or student schedules. <b>NOTE</b> Reports must be designed to check this option.

- 6 Click Save.
- 7 On the Course List page, search for Course Subject Area equals Reservation Labels.
- 8 In the Number Column, click the name of the reservation label.
- 9 On the Add/Edit Reservation Label page, in the control bar, click Reservation Offerings.
- 10 On the Course Offerings page, select the default Scheduling Group and Allowed Offerings and, in the Meeting Patterns pane, specify the meeting patterns available to the reservation label.
- 11 Click Save.

## Manually Assigning Teacher Preparation Periods - Example

This example illustrates a method for assigning a specific preparation period to a teacher. The preparation period uses the same meeting patterns that have been created for other courses and is assigned directly to the teacher’s schedule.

### To create a reservation label:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 1, click Course Setup.
- 4 On the Course List page, from the Actions menu, click Create Reservation Label.  
The Add/Edit Reservation Label page opens.



- 5 On the Add Reservation Label page, enter the following information:

Field	Setting
Name	Prep Period
Short Name	PP
Type	Teacher
Scheduling Load	0
Print on Reports	Y <b>NOTE</b> Reports must be designed to check this flag. By default, reservation labels are included on reports.

- 6 Click Save.  
7 On the Course List page, expand the Course Search panel and search for Course Subject Area equals Reservation Labels.  
8 In the Number column, click PP.

Scheduling > Course List

Actions ▾ Edit ▾ Reports ▾ Help ▾ | Home | Log off |

Course Search ▾

Search Results ▲

List: Course subject area equals "Reservation Labels" ▾ Group by: Subject Area ▾

Selected: 0 Total: 3

<input type="checkbox"/>	Number	Name ▲	Short name	State number
<b>Reservation Labels</b>				
<input type="checkbox"/>	ES	Early Start	ES	
<input type="checkbox"/>	LS	Late Start	LS	
<input checked="" type="checkbox"/>	PP	Prep Period	PP	

\* Course is required

- 9 In the control bar, click Course Offerings.  
10 On the Course Offerings page, select the Scheduling Group and assign all the meeting patterns. Click Save.

### To assign the preparation period:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 5, click Master Schedule.
- 4 On the By Course tab, search for Course Subject Area equals Reservation Labels.
- 5 In the Preparation Period heading bar, click Add Class.
- 6 Select the class.

- 7 In the Class Schedule panel, in Meeting Pattern, select the meeting pattern you want to assign and, in Teacher, select the teacher.
- 8 Repeat Steps 4 to 6 to add a preparation period to each teacher you want to assign a preparation period. Click Save.

## Automatically Assigning Teacher Preparation Periods - Example

This example illustrates a method for automatically assigning preparation periods to teachers based on teacher preferences. The preparation period uses the same meeting patterns that have been created for other courses and classes are assigned when classes are scheduled in the Master Schedule.

### To create a reservation label:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 1, click Course Setup.
- 4 On the Course List page, from the Actions menu, click Create Reservation Label.
- 5 On the Add Reservation Label page, enter the following information:

Field	Setting
Name	Prep Period
Short Name	PP
Type	Teacher
Scheduling Load	0
Print on Reports	Y <b>NOTE</b> Reports must be designed to check this flag. By default, reservation labels are included on reports.

- 6 Click Save.
- 7 On the Course List page, expand the Course Search panel and search for Course Subject Area equals Reservation Labels.
- 8 In the Number column, click PP.
- 9 In the control bar, click Course Offerings.
- 10 On the Course Offerings page, select the Scheduling Group and assign all the meeting patterns. Click Save.

### To assign teacher preferences:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 1, click Staff Setup.
- 4 Search for the teachers you want to assign a preparation period.
- 5 In the Search Results, in the Name column, click the teacher you want to assign a preparation period.

- 6 On the Staff Scheduling Properties page, expand the Course Search panel and search for Course Subject Area equals Reservation Labels.
- 7 In the Search Results, select the preparation period. Click Add.
- 8 Click OK.
- 9 In the list of preferred courses, select Prep Period and set the preference to 1. Click OK.
- 10 Repeat Steps 4 to 9 for all teachers you want to assign the preparation period.

**To create preparation period classes:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 5, click Course Request Tally.
- 4 On the Course Request Tally page, search for Course Subject Area equals Reservation Labels.  
The Course Requests column shows the number of teachers who have the reservation label as a preference.
- 5 Select Prep Period. From the Actions menu, click Calculate Classes Needed.  
By default, the scheduler creates one reservation label class for each teacher who has the reservation label as a preference.
- 6 From the Actions menu, click Create Classes. Click Save.

**To allocate teachers:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 5, click Teacher Allocations.
- 4 On the Teacher Allocations page, on the By Courses tab, search for Course Subject Area equals Reservation Labels.  
The teachers who have the reservation label as a preference are listed under the reservation label.
- 5 Select the teachers you want to allocate classes to and, from the Actions menu, click Allocate Teachers. Click Save.

**To assign the preparation period:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 5, click Master Schedule.
- 4 On the By Course tab, search for Course Subject Area equals Reservation Labels.
- 5 Select the classes you want to schedule. From the Actions menu, click Schedule Classes.

## Automatically Assigning Students to Early or Late Starting Times - Example

This example illustrates a method for reserving the early or late periods for schools that use extended day patterns. This method allows the student loader to automatically assign either an early start or a late start to students, and prevents the automatic scheduler from scheduling classes during the reserved times.

For this example, assume that the school has an eight-period bell schedule and students are required to attend five periods. The school has approximately 1000 students and wants half scheduled for early classes and half scheduled for late classes.

### To create early start and late start meeting patterns:

You need to create a meeting pattern to reserve the first three periods of each day and another meeting pattern to reserve the last three periods of each day.

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 2, click Meeting Patterns.
- 4 On the Meeting Patterns page, from the Actions menu, click Create Meeting Pattern.
- 5 On the Add Meeting Pattern page, create two meeting patterns using the following settings:

Field	Setting 1	Setting 2
Meeting Pattern Name	Reserve - am	Reserved - pm
Short Name	RAM	RPM
Periods	1, 2, and 3 for each day in the day pattern	6, 7, and 8 for each day in the day pattern.

### To create reservation labels:

You need to create a student reservation label that will be used to reserve either the first three or last three periods of the day for each student.

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 1, click Course Setup.

- 4 On the Course List page, from the Actions menu, click Create Reservation Label. The Add/Edit Reservation Label page opens.

Scheduling > Course List > Add/Edit Reservation Label

Actions Help | Home | Log off |

Add Reservation Label

\*Name: Do Not Schedule

\*Short Name: DNS

Type:  Teacher  
 Student  
 Room

Scheduling Load: 0

\*Maximum Students: 525

\*Minimum Students: 475

\*Optimal Students: 500

Print on Reports

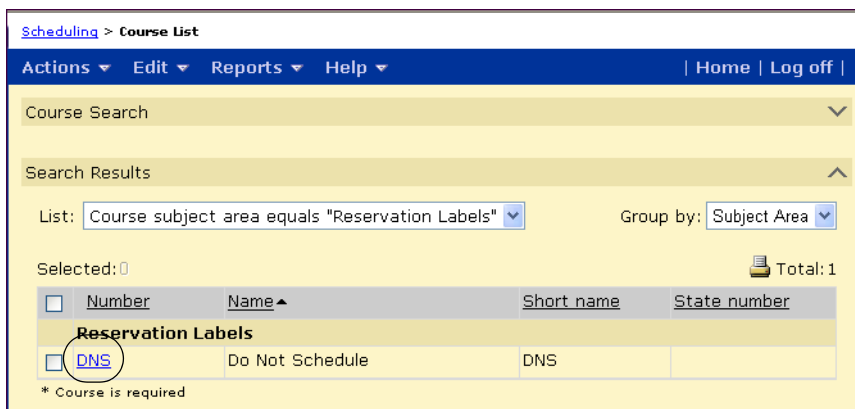
\*Required Save Reset

- 5 On the Add Reservation Label page, enter the following information:

Field	Setting
Name	Do Not Schedule
Short Name	DNS
Type	Student
Scheduling Load	0
Maximum Students	525
Minimum Students	475
Optimal Students	500
Print on Reports	N
	<p><b>NOTE</b>            Reports must be designed to check this flag. By default, reservation labels are included on reports.</p>

- 6 Click Save.
- 7 On the Course List page, expand the Course Search panel and search for Course Subject Area equals Reservation Labels.

- In the Number column, click DNS.



- In the control bar, click Course Offerings.
- On the Course Offerings page, select the Scheduling Group and assign the Reserve - am and Reserve - pm meeting patterns. Click Save.

### To assign the reservation label to students:

Since all students must have either an early or late start, assign the Do Not Schedule reservation label to all students and give it a priority of 1.

- Log on as a school administrator.
- Open a Student Search page and select all students.
- On the Student Search page, from the Actions menu, click Assign > Course Requests.
- On the Assign Requests page, in the Basic Course Search, search for Course Subject Area equals Reservation Labels.
- In the Course Search Results, select the Do Not Schedule reservation label and click Add Request. Click Apply.

### To create reservation label classes and assign meeting patterns:

- Log on as a school administrator.
- In the control bar, under Admin, click Scheduling.
- On the Scheduling page, under Step 5, click Course Request Tally.
- In the Basic Search, search for Course Subject Area equals Reservation Labels.
- Select the Do Not Schedule reservation label and, in the Classes Required column, enter 2.
- From the Actions menu, click Create Classes. Click Save.
- In the control bar, under Admin, click Scheduling.
- On the Scheduling page, under Step 5, click Master Schedule.
- On the Master Schedule page, search for Course Subject Area equals Reservation Labels.
- Select the Do Not Schedule-1 class.
- Under the Class Schedule panel, in Meeting Pattern, select RAM. Click Save.
- Select the Do Not Schedule-2 class.
- Under the Class Schedule panel, in Meeting Pattern, select RPM. Click Save.

**To load student schedules:**

When you load student schedules, students are equally distributed into the two Do Not Schedule classes and other classes are not scheduled during the reserved periods.

**NOTE**

The Student Loader is unavailable once you enter grades or attendance in the active calendar. In this case, you can still assign courses and classes to students from the Student Schedule page. For more information, see “Working with Student Schedules” on page 321.

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 6, click Load Students.
- 4 Search for and select students.
- 5 From the Actions menu, click Load Students.

**Manually Assigning Students to Early or Late Start Times - Example**

This example illustrates a manual method for reserving the early or late periods for schools that use extended day patterns. This method allows you to select the students who are assigned the early start or late start schedule.

For this example, assume that the school has an eight-period bell schedule and students are required to attend five periods. The school has approximately 1000 students.

**To create early start and late start meeting patterns:**

You need to create a meeting pattern to reserve the first three periods of each day and another meeting pattern to reserve the last three periods of each day.

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 2, click Meeting Patterns.
- 4 On the Meeting Patterns page, from the Actions menu, click Create Meeting Pattern.
- 5 On the Add Meeting Pattern page, create two meeting patterns using the following settings:

Field	Setting 1	Setting 2
Meeting Pattern Name	Reserve - am	Reserved - pm
Short Name	RAM	RPM
Periods	1, 2, and 3 for each day in the day pattern.	6, 7, and 8 for each day in the day pattern.

**To create reservation labels:**

For this example, you need to create two student reservation labels that you will assign to specific students.

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 1, click Course Setup.

- 4 On the Course List page, from the Actions menu, click Create Reservation Label.
- 5 On the Add Reservation Label page, create two reservation labels with the following information:

Field	Setting 1	Setting 2
Name	Early Start	Late Start
Short Name	ES	LS
Type	Student	Student
Scheduling Load	0	0
Maximum Students	525	525
Minimum Students	475	475
Optimal Students	500	500
Print on Reports	N	N
<b>Note</b> Reports must be designed to check this flag. By default, reservation labels are included on reports.		

- 6 On the Course List page, expand the Course Search panel and search for Course Subject Area equals Reservation Labels.
- 7 In the Number column, click ES.
- 8 In the control bar, click Course Offerings.
- 9 On the Course Offerings page, select the Scheduling Group and assign the Reserve - pm meeting pattern. Click Save.
- 10 On the Course List page, in the Number column, click LS.
- 11 In the control bar, click Course Offerings.
- 12 On the Course Offerings page, select the Scheduling Group and assign the Reserve - am meeting pattern. Click Save.

**To assign the reservation label to students:**

- 1 Log on as a school administrator.
- 2 Open a Student Search page and select the students you want to have an early start time.
- 3 On the Student Search page, from the Actions menu, click Assign > Course Requests.
- 4 On the Assign Requests page, in the Basic Course Search, search for Course Subject Area equals Reservation Labels.
- 5 In the Course Search Results, select the Early Start reservation label and click Add Request. Click Apply.
- 6 Repeat Steps 2 to 5 for the students you want to have a late start time.

**To create reservation label classes and assign meeting patterns:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 5, click Course Request Tally.



- 4 In the Basic Search, search for Course Subject Area equals Reservation Labels.
- 5 Select the Early Start and Late Start reservation labels and, from the Actions menu, click Calculate Classes Needed.
- 6 From the Actions menu, click Create Classes. Click Save.
- 7 In the control bar, under Admin, click Scheduling.
- 8 On the Scheduling page, under Step 5, click Master Schedule.
- 9 On the Master Schedule page, search for Course Subject Area equals Reservation Labels.
- 10 Select the Early Start-1 class.
- 11 Under the Class Schedule panel, in Meeting Pattern, select RPM. Click Save.
- 12 Select the Late Start-1 class.
- 13 Under the Class Schedule panel, in Meeting Pattern, select RAM. Click Save.

**To load student schedules:**

When you load student schedules, students are assigned to Early or Late Start times according to the reservation label request entered for the student. Other classes are not scheduled during the reserved periods.

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 6, click Load Students.
- 4 Search for and select students.
- 5 From the Actions menu, click Load Students.

**NOTE**

The Student Loader is unavailable once you enter grades or attendance in the active calendar. In this case, you can still assign courses and classes to students from the Student Schedule page. For more information, see “Working with Student Schedules” on page 321.

## Setting Up Reservation Labels for Student/Teacher Meetings - Example

This example illustrates a method for reserving time for student-teacher meetings for activities such as tutoring or counseling sessions in which attendance and grades are not collected.

**NOTE**

Resource services can also be used to schedule students for special assistance, either within their regular class or pulled out to a different room. For more information about resource services, see “Setting Up Resource Services (active calendar only)” on page 313.

For this example, assume that you want to create a Math Assistance session in which a teacher provides additional math instruction to a small group of students. The Math Assistance session uses the same meeting patterns that have been created for other courses and is assigned directly to both teacher and student schedules.

**To create a reservation label:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.

- 3 On the Scheduling page, under Step 1, click Course Setup.
- 4 On the Course List page, from the Actions menu, click Create Reservation Label. The Add/Edit Reservation Label page opens.

Scheduling > Course List > Add/Edit Reservation Label

Help | Home | Log off |

Add Reservation Label

\*Name:

\*Short Name:

Type:  Teacher  
 Student  
 Room

Scheduling Load:

\*Maximum Students:

\*Minimum Students:

\*Optimal Students:

Print on Reports

\*Required

- 5 On the Add Reservation Label page, enter the following information:

Field	Setting
Name	Math Assistance
Short Name	Math Asst.
Type	Student
Scheduling Load	.5
Maximum Students	5
Minimum Students	1
Optimal Students	3
Print on Reports	Y <b>NOTE</b> Reports must be designed to check this flag. By default, reservation labels are included on reports.

- 6 Click Save.
- 7 On the Course List page, expand the Course Search panel and search for Course Subject Area equals Reservation Labels.

- 8 In the Number column, click Math Asst.

The screenshot shows a web interface for course scheduling. At the top, there is a navigation bar with 'Scheduling > Course List' and a menu with 'Actions', 'Edit', 'Reports', and 'Help'. Below this is a search bar with 'Course Search' and a dropdown arrow. The search results section shows a list of courses filtered by 'Course subject area equals "Reservation Labels"' and grouped by 'Subject Area'. A table with columns 'Number', 'Name', 'Short name', and 'State number' is displayed. The table has a sub-heading 'Reservation Labels' and one row with 'Math Asst.' in the 'Number' column, 'Math Assistance' in the 'Name' column, and 'Math Asst.' in the 'Short name' column. A checkbox next to 'Math Asst.' is checked. Below the table, it says '\* Course is required'.

- 9 In the control bar, click Course Offerings.  
 10 On the Course Offerings page, select the Scheduling Group and assign the meeting patterns you want available to the math assistance session. Click Save.

#### To assign the math assistance session to a teacher and room:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 5, click Master Schedule.
- 4 On the By Course tab, search for Course Subject Area equals Reservation Labels.
- 5 In the Math Assistance heading bar, click Add Class.
- 6 Select the class.
- 7 In the Class Schedule panel, in Meeting Pattern, select the meeting pattern you want to assign; in Teacher, select the teacher; and in Room, select the room. Click Save.

#### To assign the math assistance session to students:

- 1 Log on as a school administrator.
- 2 Open a Student Search page and select the students you want to assign the Math Assistance session.
- 3 On the Student Search page, from the Actions menu, click Assign > Classes.
- 4 On the Class Search tab, search for Course Subject Area equals Reservation Labels.
- 5 In the Course Search results, select the Math Assistance class. Click Add Class.
- 6 Click Apply.



# Using Planning Schedules

A blank planning schedule is automatically created when you create a planning calendar. You can create additional planning schedules to try different scheduling scenarios for the next school year.

## NOTE

Although you can have multiple planning schedules, only one planning schedule can be active at one time. For more information, see “Copying and Switching Planning Schedules” on page 169.

Aside from changes to rooms and staff, what you do in the planning calendar does not affect the school active calendar. Changes to rooms and staff affect the active calendar and all planning schedules in the planning calendar. Changes to the course catalog setup lists on the Course Catalog Home page (District Setup > Course Catalog) apply to both the active and planning calendars, as well as all planning schedules in the planning calendar. Courses are assigned and published for schools by the district and must be assigned and published for each calendar year. If required courses are not available in the school planning calendar, contact your district administrator.

In the planning calendar, you can create one or more planning schedules, provided you have the Change Planning Schedule permission. You can set up a different scheduling scenario in each planning schedule with different teachers, rooms, courses, or classes until you are satisfied with the schedule for the coming school year.

For more information about the planning calendar, see “Creating a Planning Calendar” in the Chancery SMS School Setup Guide.

## Creating Planning Schedules

Planning schedules can only be created in the planning calendar, so you must have set up a planning calendar, including the courses for the coming year.

For information about creating and switching to a planning calendar, see “Switching to the School Planning Calendar” on page 9.

## NOTE

Staff, rooms, and courses are not part of the planning schedule. Although you can update staff and rooms in the planning calendar, there is only one set of staff and one set of rooms that are used by both the active and planning calendars. Therefore, any changes you make to staff or rooms, whether in the active calendar or the planning calendar, affect the data in both calendars. Courses in the planning calendar do not affect the active calendar. However, the courses you set up in the planning calendar are set up for all planning schedules in the planning calendar. For more information about updating staff, rooms, and courses, see “Configuring Rooms, Staff, & Courses” on page 131.

You can create as many planning schedules as you need to find the best schedule. Use the Planning Schedule dropdown under Step 2 on the Scheduling page to switch planning schedules. Switching planning schedules affects student course requests. For more information, see “Copying and Switching Planning Schedules” on page 169.

## NOTE

To be able to create and switch between planning schedules, the Change Planning Schedule permission must be set to “Yes”. By default, this permission is set to “No”. For more information, see “Permission to Work with Secondary Scheduling” on page 121.

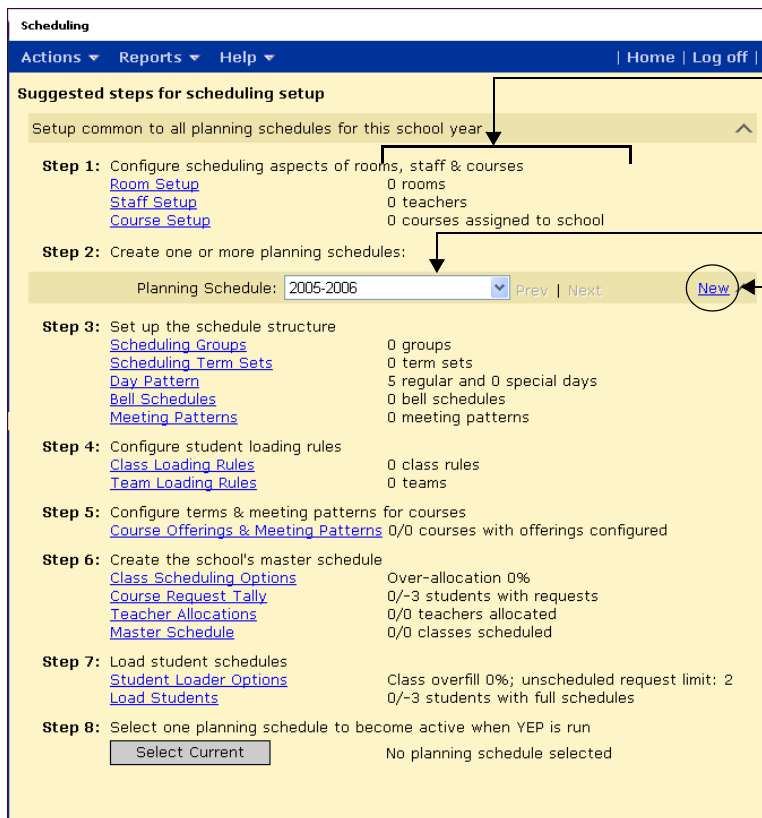
Because you can have multiple planning schedules, be sure you are working in the correct one.

**IMPORTANT NOTE**

Although you can have multiple planning schedules, only one planning schedule can be active at one time.

**To create or copy a planning schedule:**

- 1 Log on as a school administrator.
- 2 If not already using the planning calendar, switch to the planning calendar.
- 3 In the control bar, under Admin, click Scheduling.  
Under Step 2, the Planning Schedule dropdown shows the current planning schedule.  
If you have permission, use the planning schedule dropdown to view all planning schedules and switch to another planning schedule.
- 4 To create another planning schedule, click New to the right of the Planning Schedule dropdown.



The column to the right of the links summarizes what is set up for this planning schedule.

Shows the current planning schedule. To open a different planning schedule select it from the dropdown.

To create a new planning schedule, click New.

- 5 On the New Planning Schedule page, specify which calendar you want to copy from and which scheduling elements you want to copy.

**NOTE**

Teacher preferences are copied automatically when you create a new planning scheduled based on the active calendar schedule. Courses are not copied from the school active calendar. They must be assigned and published for the school from the district planning calendar. If required courses are not available in the school planning calendar, contact your district administrator.

The screenshot shows a web-based dialog box titled "Scheduling > New Planning Schedule". At the top, there are links for "Help", "Home", and "Log off". The main content area includes a "Copy from schedule:" dropdown menu currently set to "Planning Schedule 1". Below this is a text input field for "\*To new planning schedule:" and a larger text area for "Description:". A section titled "Elements to copy:" contains a list of checkboxes: "Course Requests (will be copied from: Planning Schedule 1)" is checked, while "Scheduling Groups", "Term Sets (requires Scheduling Groups)", "Day Pattern", "Bell Schedules (requires Day Pattern & Scheduling Groups)", "Meeting Patterns (requires Bell Schedules)", "Course Scheduling Information (requires Meeting Patterns & Term Sets)", "Class Loading Rules", "Team Loading Rules", "Teacher Allocations (requires Course Scheduling Information)", "Class Schedules (requires Course Scheduling Information)", and "Student Schedules (requires Class Schedules)" are all unchecked. At the bottom of this section are "Select All" and "Deselect All" buttons. The dialog concludes with "OK" and "Cancel" buttons and a "\*Required" label.

Field	Description
Copy From Schedule	Choose the schedule you want to copy. You can copy from one of the following schedules into the planning schedule: <ul style="list-style-type: none"> <li>• the active schedule you are using in the active calendar</li> <li>• a planning schedule you have created</li> <li>• a historical schedule</li> </ul> To create a blank planning schedule, choose None. Copying planning schedules affects student course requests. For more information, see "Copying and Switching Planning Schedules" on page 169.
To New Planning Schedule	Enter a name for the planning schedule you are creating.
Description	Enter a description. (optional)

Field	Description
Elements to Copy	<p>Select the scheduling elements you want to copy to the new planning schedule.</p> <p>If you select an element that requires other elements, the required elements are automatically selected and dimmed so that you cannot deselect them.</p> <p>For example, if you select Term Sets, Scheduling Groups is automatically selected and dimmed because it is required. However, if you later deselect Term Sets, Scheduling Groups is not dimmed but is still selected.</p> <p>If you do not select any scheduling elements, a blank planning schedule is created.</p>

**6** Click OK.

On the Scheduling page, use the Planning Schedule dropdown to select the planning schedule you want to work with. The messages to the right of the links on this page summarize what is set up for the selected planning schedule.

After you create a planning schedule, you can define its scheduling structure and schedule classes, teachers, and students. Settings in one planning schedule do not affect the settings in other planning schedules.

As the next school year approaches, you must select one planning schedule to roll over as the new active schedule for the next school year. For more information about selecting a planning schedule for the next year, see “Selecting a Planning Schedule (planning calendar only)” on page 319.

## Editing and Deleting Planning Schedules

You can change the name or description of planning schedules or delete them.

### To edit a planning schedule name or description:

- 1** Log on as a school administrator.
- 2** If not already using the planning calendar, switch to the planning calendar.
- 3** In the control bar, under Admin, click Scheduling.
- 4** In the Planning Schedule dropdown, select the planning schedule you want to edit.
- 5** From the Actions menu, click Edit Planning Schedule.
- 6** Make changes to the name or description. Click OK.

### To delete a planning schedule:

- 1** Log on as a school administrator.
- 2** If not already using the planning calendar, switch to the planning calendar.
- 3** In the control bar, under Admin, click Scheduling.
- 4** In the Planning Schedule dropdown, select the planning schedule you want to delete.
- 5** From the Actions menu, click Delete Planning Schedule. Click OK.

The planning schedule and everything that is set up in that planning schedule is deleted.



## Copying and Switching Planning Schedules

Because creating and switching planning schedules affects student course requests, the Change Planning Schedule permission is set to No by default. Before you allow multiple people to create and switch between planning schedules, carefully consider the impact on student course requests. In addition, only one planning schedule can be active at one time. Assign the permission to change planning schedules to a minimum number of users so you can coordinate working in different planning schedules.

The following table describes how actions in the planning calendar affect course requests.

Action	Effect on Course Requests
Create a planning schedule	Course requests are copied to the new planning schedule. Depending on which planning schedule is selected when you click New, some or all of the course requests in the selected planning schedule are copied to the new planning schedule.
Copy from an active schedule or historical schedule	Course requests are not copied from these schedules because old course requests are not useful in a planning schedule. The course requests in the currently-selected planning calendar are copied to the new planning schedule.
Copy from another planning schedule	All the course requests in the other planning schedule are copied to the new planning schedule. Also, any course requests that only exist in the currently-selected planning schedule are copied to the new planning schedule.
Switch to another planning schedule	All the unchanged course requests are copied to the destination planning schedule. Changed course requests are not copied. This allows you to have different planning schedules with different course requests.

### To switch the planning schedule:

- 1 Log on as a school administrator.
- 2 If not already using the planning calendar, switch to the planning calendar.
- 3 In the control bar, under Admin, click Scheduling.
- 4 From the Planning Schedule dropdown, choose the planning schedule you want to work with.

The messages to the right of the links on this page summarize what is set up for the selected planning schedule.

If you copied scheduling elements when you created the planning schedule, you can modify the scheduling elements you copied. If you created a blank planning schedule, you must set up a new scheduling structure.

**Scheduling**

Actions ▾ Reports ▾ Help ▾ | Home | Log off |

**Suggested steps for scheduling setup**

Setup common to all planning schedules for this school year ^

**Step 1:** Configure scheduling aspects of rooms, staff & courses  
[Room Setup](#) 0 rooms  
[Staff Setup](#) 0 teachers  
[Course Setup](#) 0 courses assigned to school

**Step 2:** Create one or more planning schedules:  
Planning Schedule: 2005-2006 ▾ Prev | Next [New](#) ^

**Step 3:** Set up the schedule structure  
[Scheduling Groups](#) 0 groups  
[Scheduling Term Sets](#) 0 term sets  
[Day Pattern](#) 5 regular and 0 special days  
[Bell Schedules](#) 0 bell schedules  
[Meeting Patterns](#) 0 meeting patterns

**Step 4:** Configure student loading rules  
[Class Loading Rules](#) 0 class rules  
[Team Loading Rules](#) 0 teams

**Step 5:** Configure terms & meeting patterns for courses  
[Course Offerings & Meeting Patterns](#) 0/0 courses with offerings configured

**Step 6:** Create the school's master schedule  
[Class Scheduling Options](#) Over-allocation 0%  
[Course Request Tally](#) 0/-3 students with requests  
[Teacher Allocations](#) 0/0 teachers allocated  
[Master Schedule](#) 0/0 classes scheduled

**Step 7:** Load student schedules  
[Student Loader Options](#) Class overfill 0%; unscheduled request limit: 2  
[Load Students](#) 0/-3 students with full schedules

**Step 8:** Select one planning schedule to become active when YEP is run  
 No planning schedule selected

Select the planning schedule you want to work with.

# Setting Up the Scheduling Structure

Before you can schedule classes, teachers, and students, you must set up the basic structure of your school schedule, including defining scheduling groups, scheduling term sets and scheduling terms, the day pattern, bell schedules, and meeting patterns.

## NOTE

The scheduling structure can affect data mapping. For an overview of data mapping constraints, see “Switching to the School Planning Calendar” on page 9. In addition, constraints related to specific features are mentioned in the procedures for setting up those features.

You can set up the scheduling structure either in the active calendar or in a planning calendar. In the planning calendar, you can set up a separate schedule structure for each planning schedule so that you can see which scenario is best for your school.

## NOTE

In a planning schedule, the changes you make affect only the planning schedule you’re working in. Your changes do not affect the active calendar or any other planning schedules. However, if changes apply to both the active schedule and a planning schedule, you must make them in both schedules.

## Defining Scheduling Groups

A scheduling group is a group of students who use the same term set, term dates, bell schedules, and meeting patterns. You can set up multiple scheduling groups. Each scheduling group can have its own term set and term dates, bell schedules, and meeting patterns.

For example, you can set up scheduling groups by grades, such as a Junior group for grades 9 and 10, and a Senior group for grades 11 and 12. Or you can set up scheduling groups by programs, such as an Accelerated group for the Advance Placement and Honors classes, and a Regular group for the regular classes. Another example is to set up a separate scheduling group with a different bell schedule for double-block classes.

Later, when you set up term sets and term dates, you define the start and end dates of each term for each scheduling group.

## NOTE

For data mapping, the bell schedule must be the same in all scheduling groups, that is, the period codes and period start and end times must be the same. You can create different meeting patterns based on the bell schedules to accommodate different class types.

### To set up scheduling groups:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.

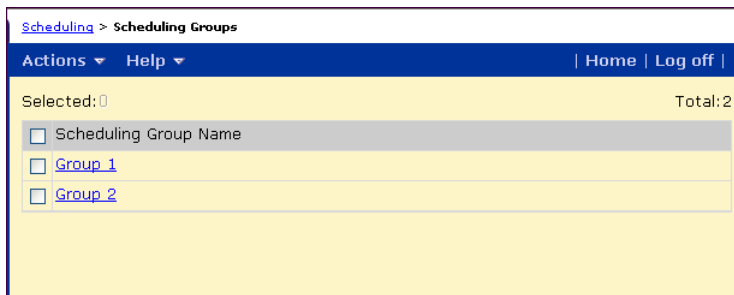
The messages to the right of the links on this page summarize what is set up for this planning schedule.

- 4 If you are using a planning calendar, on the Scheduling page, under Step 3, click Scheduling Groups.

OR

If you are using the active calendar, on the Scheduling page, under Step 2, click Scheduling Groups.

The Scheduling Groups page opens.



- 5 On the Scheduling Groups page, do one of the following:

To	Do this
Add a scheduling group	<ul style="list-style-type: none"> <li>From the Actions menu, click Add Group.</li> </ul>
Edit a scheduling group	<ul style="list-style-type: none"> <li>Click the name of the scheduling group you want to edit. OR Select the scheduling group you want to edit. From the Actions menu, click Edit Groups.</li> </ul>
Delete a scheduling group	<p>Deleting scheduling groups also deletes its bell schedules, scheduling periods, and meeting patterns, along with term lunch periods.</p> <p>In the active calendar, if classes have been created for a scheduling group, you cannot delete the scheduling group.</p> <ol style="list-style-type: none"> <li>Select the scheduling group you want to delete.</li> <li>From the Actions menu, click Delete Group.</li> <li>Click OK and skip the remaining steps.</li> </ol>

- 6 On the Edit Group page, enter or edit the following information as needed:

Field	Description
Name	Enter a unique scheduling group name.
Code	Enter a short code of up to two characters. Use meaningful short codes so you know what they mean when displayed on other pages.
Description	Enter a description of up to 250 characters. (optional)

- 7 Click OK.

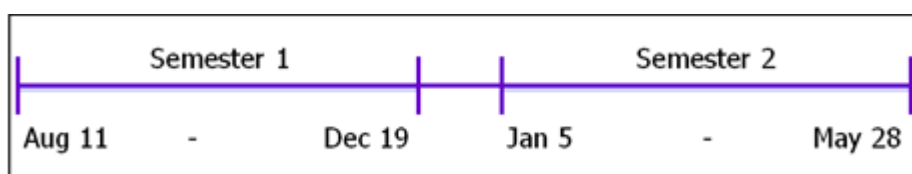
## Setting Up Scheduling Term Sets

After you define the scheduling groups, you can define term sets.

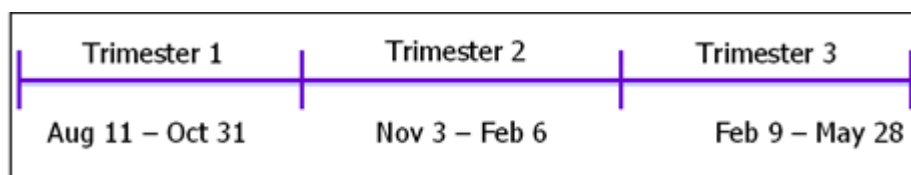
Term sets allow you to segment the school year. You can create as many term sets as you need and give each term set any name. For each term set, create as many terms as are needed to divide the school year, and define the start and end dates of each term. Then choose which scheduling group uses which term set.

You can put classes into more than one term set; that is, you can have some students following one term set, and some following another term set. You can also put a student into classes in different term sets; that is, a student can be in some classes in the full-year term set and some classes in the semester term set.

For example, you can create a term set with two terms or semesters.



If your school has students following a trimester schedule, you can also create a term set with three terms.



### NOTE

For data mapping, you can define a maximum of 12 unique term ranges for each school year. If you can combine terms to form another term, that term does not count toward the maximum number of allowed terms. For example, if you have three term sets (year, quarters, and semesters) then the total number of terms is seven (1 + 4 + 2). However, since you can combine the quarters to form both the semesters and the year, only the four terms in the quarters are counted toward the maximum number of terms. Terms within the same term set cannot overlap.

### To set up term sets:

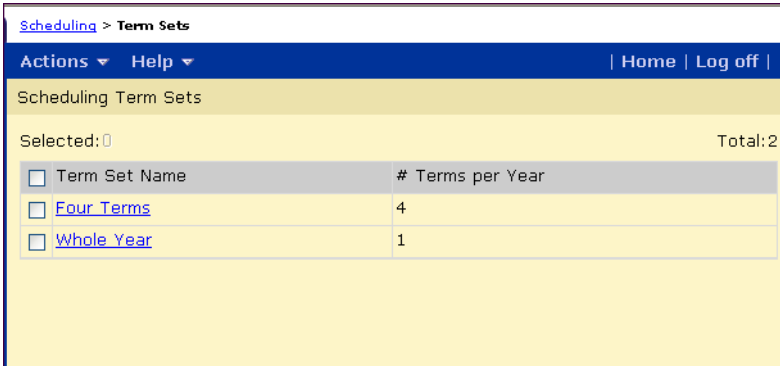
- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.

- 4 If you are using a planning calendar, on the Scheduling page, under Step 3, click Scheduling Term Sets.

OR

If you are using the active calendar, on the Scheduling page, under Step 2, click Scheduling Term Sets.

The Term Sets page displays any term created for the schedule and the number of terms in each term set.



- 5 On the Term Sets page, do one of the following:

To	Do this
Add a term set	<ul style="list-style-type: none"> <li>From the Actions menu, click Add Term Set.</li> </ul>
Edit a term set	<ul style="list-style-type: none"> <li>Click the name of the term set you want to modify.</li> <li>OR</li> <li>Select the term set. From the Actions menu, click Edit Term Set.</li> </ul>
Delete a term set	<p>Before you can delete term sets in the active calendar, you must delete any daily code calculation rules (bell rules).</p> <ol style="list-style-type: none"> <li>Select a term set.</li> <li>From the Actions menu, click Delete Term Set.</li> <li>Click OK and skip the remaining steps.</li> </ol>

- 6 On the Add Term Set of Edit Term Set page, enter or edit the following information as needed:

Field	Description
Term Set Name	Enter a unique name for the term set.
Term Name and Code	Enter the names, up to 25 characters, for each term. Enter the codes, up to 3 characters, for each term. Use meaningful short codes so you know what they mean when displayed on other pages.

- 7 To specify term dates, click Continue.

**8** On the Term Dates page, enter or edit the following information, as needed:

Field	Description
Use this Term Set for this Scheduling Group	Make sure this option is selected. In a planning schedule, you can temporarily deselect this option when you are setting up a planning schedule. You must select this option to enter term dates. If this option is not selected, you cannot copy this term set to other groups, and all term dates are deleted when you click OK.
Scheduling Group	From the Scheduling Group dropdown, select the scheduling group you want to work with.
School Year	Enter the dates for the school year. You cannot use dates that fall outside your school calendar.
Start and End Date	Enter the start and end date of each term in this term set. Dates cannot overlap. For example, if one term ends on May 15, the next term cannot start on May 14 or May 15. The earliest start date for the next term is May 16. You can have gaps between terms. For example, one term can end on May 15 and the next term can start on May 20.
Edit term set	To return to the Edit Term Set page, click the Edit term set link beside the Term Set heading.
Copy to other groups	If the term dates for this scheduling group can be used in another scheduling group, click the "Copy to other groups" link beside the Scheduling Group heading. On the Copy to Groups page, specify the scheduling group to copy to. After you copy term dates to another group, making changes to one scheduling group does not affect the other.

← To return to the Edit Term Set page, click Edit Term Set.

← To copy these term dates to another scheduling group, click Copy to another group.

- 9 Click OK.

## Specifying Day Patterns

A day pattern is the cycle of days that your school operates on. For example, your school can use a day-of-the-week pattern using Monday to Friday or you can use a relative-day pattern using a set number of days in a cycle, such as day 1 to day 4 in a four-day relative cycle. The day pattern is used to define which classes are offered on which days.

### NOTE

**For Tennessee customers only:** To support the Class Section Schedule (031) extract, if your school uses semester, trimester, or quarter term sets, the total number of each day of the week in each semester, trimester, or quarter must be divisible by the number of days in the relative-day pattern. For example, if your school has a semester term set and a two-day relative day pattern (day 1 and day 2), the total number of each day of the week in each semester must be divisible by two. If semester 1 had 10 Mondays and semester 2 had 12 Mondays, extracts would calculate correctly. However, if semester 1 had 10 Fridays and semester 2 had 11 Fridays, extracts would not calculate correctly.

You can only have one day pattern for the active school year. Each planning calendar can have multiple planning schedules with different day patterns so you can determine the best scheduling scenario.

You can also set up special days when your school has a different bell schedule, such as days when your school has parent-teacher interviews, professional development days, and so on.

Using special days allows you to have a short relative-day cycle, while still accommodating special days that have a different schedule. For example, if you use a four-day relative cycle, but have a work experience day once a month, you can schedule a special day once a month on your calendar, instead of using a 30-day relative cycle with a different schedule every 30<sup>th</sup> day. For more information about setting up special days, see "Setting Up Special Days" on page 180.

### NOTE

For data mapping, special days are not supported. Use the same day schedule for all days in the day pattern. You can create different meeting patterns based on the bell schedule to accommodate different class types.

You can apply a relative day pattern to a specific date and have Chancery SMS begin using that relative day on that date. For example, if the school was unexpectedly closed due to heavy snow on Day 2, you can apply Day 2 to the following day. For more information, see "Applying Relative Day Patterns" on page 179.

### To set up a regular-day pattern or a special-day pattern:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.

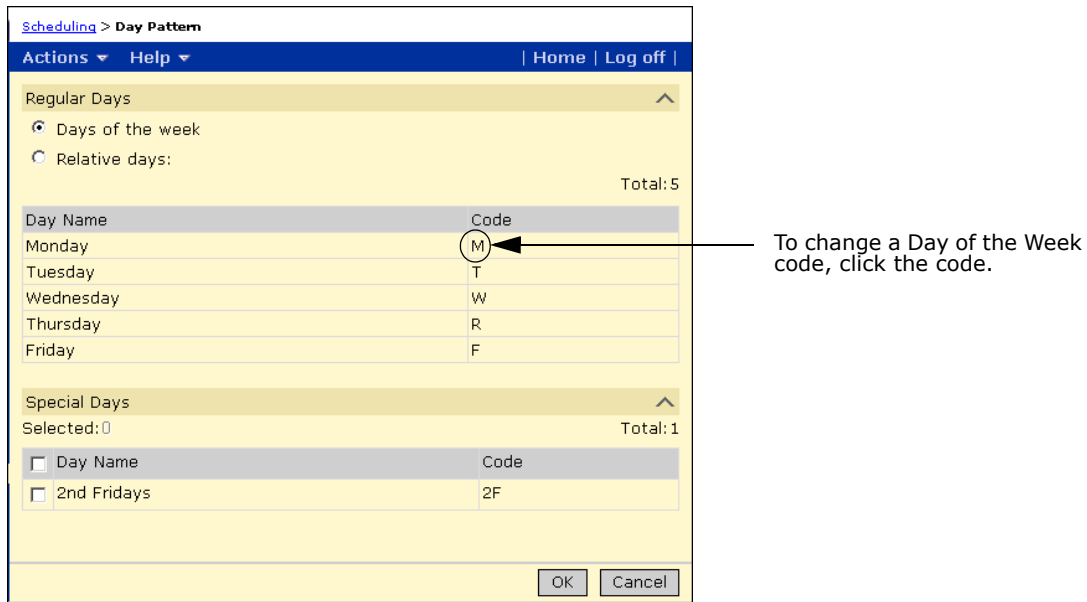


- 4 If you are using a planning calendar, on the Scheduling page, under Step 3, click Day Pattern.

OR

If you are using the active calendar, on the Scheduling page, under Step 2, click Day Pattern.

The Day Pattern page displays the regular and special days set up for the day pattern.



- 5 On the Day Pattern page, in the Regular Days section, enter information about your school’s regular day pattern.

Field	Description
Days of the Week	<p>If your school schedule uses days of the week as its day pattern, select Days of the week. Your school schedule would then follow a Monday-to-Friday pattern.</p> <p>If your school schedules classes on Saturdays or Sundays, make sure these days are set up as normal school days in the Day Types setup list. For more information, see "Setting Up and Adding Day Type Codes" in the Chancery SMS School Setup Guide.</p>

Field	Description
Relative Days	<p>If your school schedule uses relative days as its day pattern, select this option. Your school schedule would then follow a relative day pattern, such as Day 1 to Day 4.</p> <p>You must create the number of relative days and specify their day names and short codes. For example, you can set up a four-day relative cycle called Day A to Day D, or an eight-day cycle called Day 1 to Day 8.</p> <p>To add relative days, from the Actions menu, click Add Regular Day.</p> <p><b>NOTE</b>  <b>For Tennessee customers only:</b> To support the Class Section Schedule (031) extract, if your school uses semester, trimester, or quarter term sets, the total number of each day of the week in each semester, trimester, or quarter must be divisible by the number of days in the relative-day pattern. For example, if your school has a semester term set and a two-day relative day pattern (day 1 and day 2), the total number of each day of the week in each semester must be divisible by two. If semester 1 had 10 Mondays and semester 2 had 12 Mondays, extracts would calculate correctly. However, if semester 1 had 10 Fridays and semester 2 had 11 Fridays, extracts would not calculate correctly.</p>
Day Name	<p>If you are using Relative days, specify a day name for each day. To add more than five regular days, from the Actions menu, click Add Regular Days.</p> <p>If you are using Days of the week, you cannot change the name of the day. You can change the code names for the days of the week.</p>
Code	<p>Enter a short code for each day name. Use meaningful short codes so you know what they mean when displayed on other pages.</p>

- 6** On the Day Pattern page, in the Special Days section, specify the pattern for special days.

**NOTE**

If your school uses data mapping, do not set up special days.

To add more than two special days, from the Actions menu, click Add Special Days.

Field	Description
Day Name	<p>Enter a Day name for each special day, for example, Early Dismiss or PTI.</p>
Code	<p>Enter a short code for each day name. Use meaningful short codes so you know what they mean when displayed on other pages.</p>

- 7** Click OK.

**To delete days in a relative-day pattern:**

You can only delete regular days if you are using a relative-day pattern.

- 1** Log on as a school administrator.
- 2** In the control bar, under Admin, click Scheduling.

- 3** If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.
- 4** If you are using a planning calendar, on the Scheduling page, under Step 3, click Day Pattern.  
OR  
If you are using the active calendar, on the Scheduling page, under Step 2, click Day Pattern.
- 5** Select a regular day then, from the Actions menu, click Delete Regular Day.  
OR  
Select a special day then, from the Actions menu, click Delete Special Day.
- 6** Click OK.

## Applying Relative Day Patterns

### NOTE

This step must be completed in the active calendar.

If you are using relative day patterns, you must specify the date that the relative day pattern cycle begins. Throughout the school year, you can adjust the relative day pattern cycle, as required. For example, if the school was unexpectedly closed due to heavy snow on Day 2, you can apply Day 2 to the following day and the following days adjust accordingly.

Although you typically set up relative day patterns in a planning calendar when you schedule classes, you must apply the relative day pattern to a specific date in the active calendar.

### NOTE

You can only apply a relative day pattern if you set up scheduling to use relative day patterns. For more information about setting up relative day patterns, see “Specifying Day Patterns” on page 176.

You can apply a relative day pattern at any time. However, you cannot apply a relative day pattern to the past (days before today) if attendance has already been taken for those days. If you apply a relative day pattern to a future date and attendance has already been taken for those future dates, the attendance for those future dates is deleted.

### NOTE

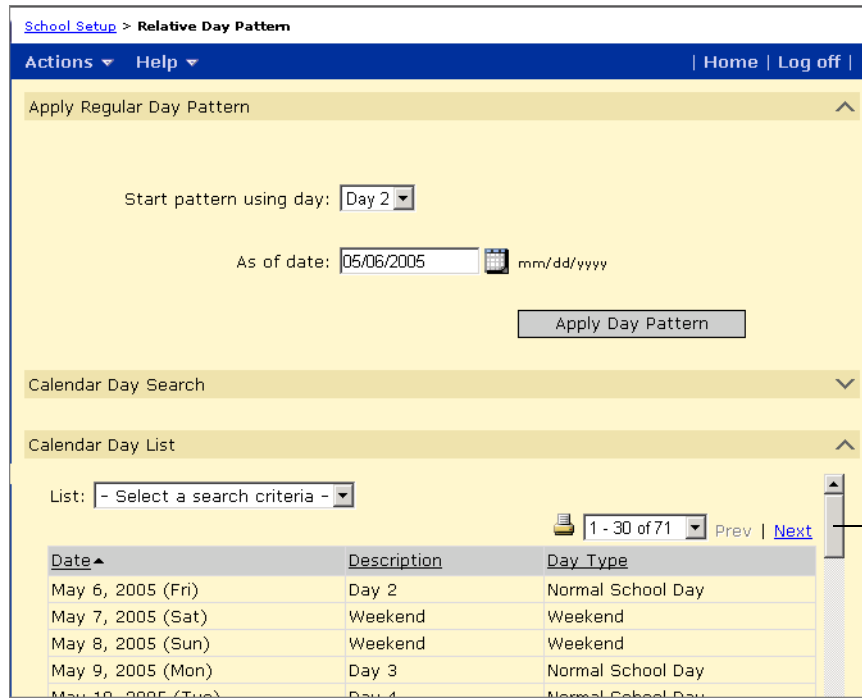
If your district uses the Chancery SMS student behavior feature, student behavior actions assigned to students might assign attendance codes for those students. When you change relative days, all future attendance is deleted, including attendance codes assigned by student behavior actions. However, student behavior attendance codes are reassigned on a day-by-day basis when the day is initialized.

### To apply a day pattern:

- 1** Log on as a school administrator.
- 2** In the control bar, under Admin, click School Setup > Relative Day Pattern.
- 3** In the “Start Pattern Using Day” dropdown, select the relative day that you want to apply to the specified date.
- 4** In the As of Date dropdown, select the date you want the relative day pattern to begin.

**5** Click Apply Day Pattern.

The Calendar Day List section refreshes to show your changes.



After you apply a new day pattern, the Calendar Day List refreshes to show the changes.

## Setting Up Special Days

For days when your school requires a different bell schedule, you can set up special days. For example, you can use special days for parent-teacher interview days, professional development days, and so on.

If your school uses relative day patterns, using special days allows you to have a short relative-day cycle, while still accommodating special days that have a different schedule. For example, if you use a four-day relative cycle, but have a work experience day once a month, you can schedule a special day once a month on your calendar, instead of using a 30-day relative cycle with a different schedule every 30<sup>th</sup> day.

**NOTE**

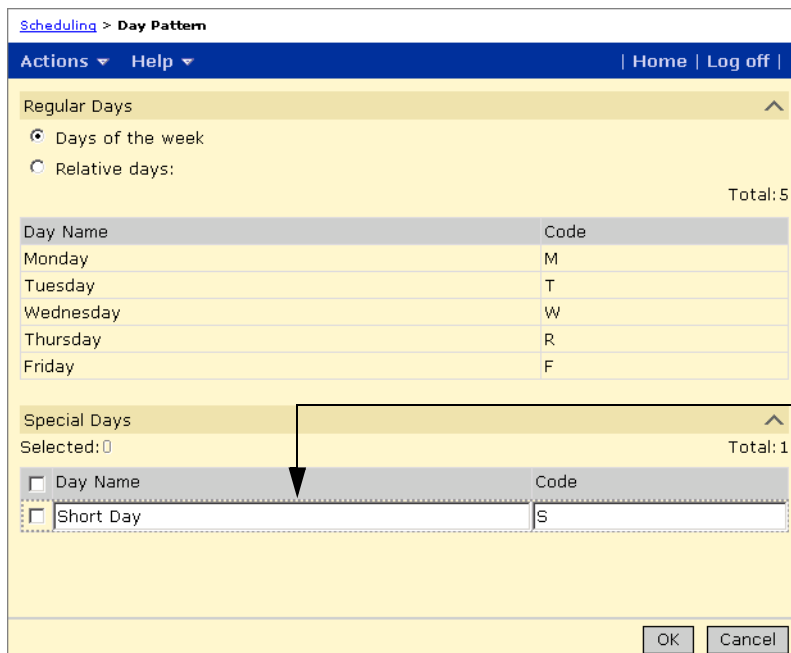
For data mapping, special days are not supported. Use the same bell schedule for all days. You can create different meeting patterns based on the bell schedule to accommodate different class types.

Setting up special days requires the following overall steps:

- Step 1: Define a name and code for the special day
- Step 2: Define a bell schedule for the special day
- Step 3: Assign a day type to the special day
- Step 4: Assign the special day to a calendar date

**Step 1: Define a name and code for the special day**

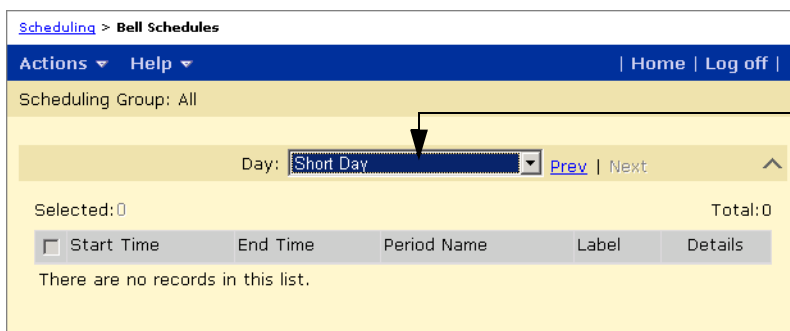
- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, click Day Pattern.
- 4 On the Day Pattern page, from the Actions menu, click Add Special Day.
- 5 On the Special Days panel, click the new row.
- 6 In the Day Name column, enter a name for the special day. In the Code column, enter a code. Click OK.



To enter special day type information, click a special day type row.  
To add more rows, from the Actions menu, click Add Special Day.

**Step 2: Define a bell schedule for the special day**

- 1 On the Scheduling page, click Bell Schedules.
- 2 On the Bell Schedules page, from the Day dropdown, select the special day you defined in Step 1.



In the Day dropdown, select the special day you defined in Step 1.

- 3 From the Actions menu, click Add Period.

- 4 On the Add Period page, enter information about the period. Click OK.  
For more information about adding periods, see "Setting Up Bell Schedule Periods" on page 185.
- 5 Repeat steps 3 and 4 to define all the periods for the special day.
- 6 Click OK.

### Step 3: Assign a day type to the special day

- 1 In the control bar, under Admin, click School Setup.
- 2 On the School Setup page, under Calendar, click Day Types (Setup List).
- 3 On the Day Types page, from the Actions menu, click Add Day Type.
- 4 On the Add Day Type page, enter information about the day type. In the Instructional Day dropdown, select "Yes" and, in the Use For Defaults In the Day Type List Setting dropdown, select "No".
- 5 Click Continue.

School Setup > Day Types > Add Day Type

Actions Help | Home | Log off |

\*Description: Early Dismissal

\*Short code: ED

State equivalent: None

Base day type: Normal School Day

\*Day value: 1.00

Take attendance: Yes

Instructional day: Yes

Use for defaults in day type list settings: No

\*Required

Continue Cancel

To set the bell schedule for this day, set Instructional Day to "Yes" and "Use for defaults in day type list settings" to "No".

Continue button is only available when Instructional Day is set to "Yes" and "Use for defaults in day type list settings" is set to "No".

- 6 On the Bell Schedules page, in the Bell Schedule Based On Day dropdown, select the special day you defined in step 1.

School Setup > Day Types > Add Day Type > Bell Schedules

Actions ▾ Help ▾ | Home | Log off |

Exception Day Type [Edit](#) ^

Description: Early Dismissal


Base day type: Normal School Day

Bell Schedule based on day: Short Day ▾

Use instructional minutes defined by base bell schedule

Scheduling Group: All ^

Total: 1

Start Time	End Time	Period Name	Label	Details
9:00 AM	10:00 AM	Period 1	P1	

OK Cancel

In the "Bell Schedule based on day" dropdown, select the special day you defined in step 1.

- 7 Click OK.

#### Step 4: Assign the special day to a calendar date

- 1 In the control bar, under Admin, click School Setup.
- 2 On the School Setup page, under Calendar, click Calendar Day Exceptions.
- 3 On the Calendar Day Exceptions page, from the Action menu, click Add Exception Day.

- 4 On the Add Exception Day page, enter information about the exception day. In the Day Type dropdown, select the day type you created in step 3.

In Day Type, select the day type you created in Step 3.

If your school uses relative days, the OK button is replaced with a Continue button. Click the Continue button to apply a relative day to the day following this special day.

- 5 If your school uses relative days, click Continue and select the relative day you want to be applied to the day following the special day.
- 6 Click Apply Day Pattern.

## Setting Up Bell Schedules

Bell schedules specify the start and end times for periods throughout the day. You can define a different bell schedule for each scheduling group and for each day in the day pattern. For example, you can have one bell schedule for the junior and intermediate scheduling groups, and a different bell schedule for the senior scheduling group.

To set up a bell schedule, add periods to the day and define the start and end times for each period.

### NOTE

To support data mapping, note the following:

- Each day in the day pattern must have the same bell schedule/period structure, including the same periods and the same number of instructional minutes in periods with the same code. For example, if on Monday, period 1 had 50 instructional minutes, period 1 must have 50 instructional minutes for every day in the day pattern. Periods within one day can have different amounts of instructional minutes.
- Each day in the day pattern can have a maximum of 42 periods.
- Periods cannot overlap.
- If more than one scheduling group is defined (e.g., to support exception days), the bell schedule must be the same in both scheduling groups, that is, the period codes and period start and end times must be the same.



## Setting Up Bell Schedule Periods

You set up a bell schedule by adding periods to each day. You can set up the periods for one day and then copy those periods to other days in the bell schedule. To copy the periods from one day to other days, see “Copying Periods from One Day to Another Day” on page 187.

After you set up periods for all days for a scheduling group, you can copy the bell schedule for all the days to other scheduling groups. To copy the periods for all days in one scheduling group to another, see “Copying Periods in All Days to Another Scheduling Group” on page 189.

### NOTE

If you are making adjustments to an existing scheduling structure, use caution when copying periods or bell schedules to other days or scheduling groups. Copying deletes any existing setup in the target day or scheduling group, which may affect daily code calculation rules, meeting patterns, or exception day types.


### To set up periods in a bell schedule:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.
- 4 If you are using a planning calendar, on the Scheduling page, under Step 3, click Bell Schedules.

OR

If you are using the active calendar, on the Scheduling page, under Step 2, click Bell Schedules.

- 5 From the Scheduling Group dropdown, select the scheduling group you want to work with.
- 6 From the Day dropdown, select the regular day or the special day you want to define.
- 7 Do one of the following:

To	Do this
Add a period	<ul style="list-style-type: none"> <li>• From the Actions menu, click Add Period.</li> </ul>
Edit a period	<ul style="list-style-type: none"> <li>• Select a period. From the Actions menu, click Edit Period.</li> </ul> <p>OR</p> <p>Click the Details icon () for the period you want to edit.</p>
Delete a period	<ol style="list-style-type: none"> <li>1 Select the period.</li> <li>2 From the Actions menu, click Delete Period.</li> </ol> <p>Skip the remaining steps.</p>

If you add or edit a period, the Add Period or Edit Period page opens.

- 8** On the Add Period or Edit Period page, specify or edit the following information for the period:

**NOTE**

If your district runs data mapping, the maximum number of periods (number of meeting blocks for each day) you can create is 42. Periods cannot overlap and each day in the day pattern must have the same bell schedule/period structure, including the same periods and the same number of instructional minutes in periods with the same code.

Field	Description
Start Time	Enter the start time for the period. The start time can be several minutes after the previous end time to allow students to get to their next class.
End Time	Enter the end time for the period.
Period Name	Enter a name for the period.
Period Label (short code)	Enter a short code for the period.
Print on Schedules	If checked, this period is displayed on student or teacher schedules. If you do not want to display this period, such as for before or after school periods, deselect this checkbox.
Use for Classes	If checked, this period is available for meeting patterns to schedule classes.
Include in daily Attendance Code Calculation Rules	If checked, this period is available for use in attendance calculation rules.
Include in instructional/attendance minutes calculations	Select this option if you want this period included in instructional or attendance minutes calculations. For more information about instructional minutes calculations, see the Chancery SMS Instructional Minutes Calculation Technical Bulletin. <b>NOTE</b> You cannot change this value if the period is part of a meeting pattern and attendance has been taken.
This period is part of regular school hours	Select this option if you want the period to be included in instructional minutes calculations as regular school hours. For example, if your school offers academic programs in the evenings or on weekends and you want them included when you calculate instructional minutes for regular school hours. <b>NOTE</b> If you want a period to be included in regular school hours for some classes, but not others, create two scheduling groups. Select "This period is part of regular school hours" in one scheduling group and deselect it in the other. Then schedule classes using the appropriate scheduling group.

Field	Description
For This Period Only	<p>Enter the amount of instruction time in the period.</p> <p>The instruction time is usually the number of minutes between the start and end time. For example, if a period starts at 9:00 and ends at 9:50, the instruction time is usually 50 minutes. If you leave this field blank, the result of this calculation is used when you click OK.</p> <p>There may be periods where the instruction time is less than the meeting time. For example, if a gym class meets for 65 minutes but there is 10 minutes for changing then enter 55 as the instruction time.</p> <p><b>NOTE</b> For data mapping, the instructional minutes for periods with the same code must be the same for all days in the day pattern and in all scheduling groups. For example, if period 1 is assigned 50 instructional minutes on Monday, period 1 must have 50 instructional minutes for all the other days of the week and in all scheduling groups.</p>
Passing Time Minutes to Include for Blocked Classes	<p>Use this when a class spans more than one period and there is non-scheduled time between periods, such as time between classes for students to get to the next class.</p> <p>For example, if your schedule has four minutes between classes for students to go to the next class, and a chemistry class spans two periods, you can specify whether that four minutes is instruction time or not.</p> <p>Using this example, say your two-period Chemistry class totals 70 minutes and includes one period in the classroom and one period in the lab, with students using the 4 minutes between periods to go from the classroom to the lab then you would enter 66 in the "For this period only" field, and 4 in the "Passing time minutes to include for blocked classes" field.</p> <p>However, if the two-period chemistry class is both in the lab then the 4 minutes would be considered instruction time and you would enter 70 in the "For this period only" field and 0 in the "Passing time minutes to include for blocked classes" field.</p>

9 Click OK.

## Copying Periods from One Day to Another Day

After you set up the periods for one day, you can copy them to other days so that you don't have to set up the same periods for every day in the day pattern. If other days have a similar bell schedule, you can copy the periods, and then change the days that are different.

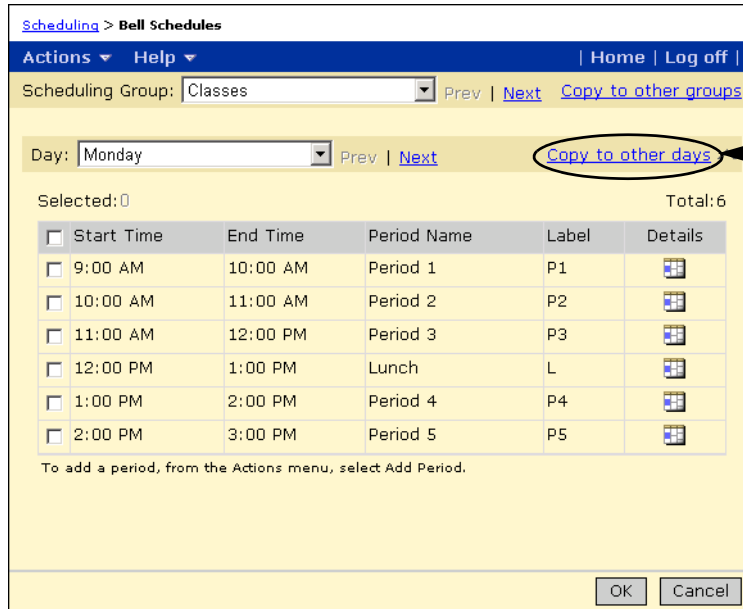
After you copy periods, making changes to the periods in one day does not affect the periods in the other day.

### NOTE

When you copy periods to another day, any periods already defined in that day are overwritten. If you are making adjustments to an existing day, use caution when copying periods to other days. Changing the periods set up for an existing day may affect daily code calculation rules, meeting patterns, or exception day types.

**To copy periods:**

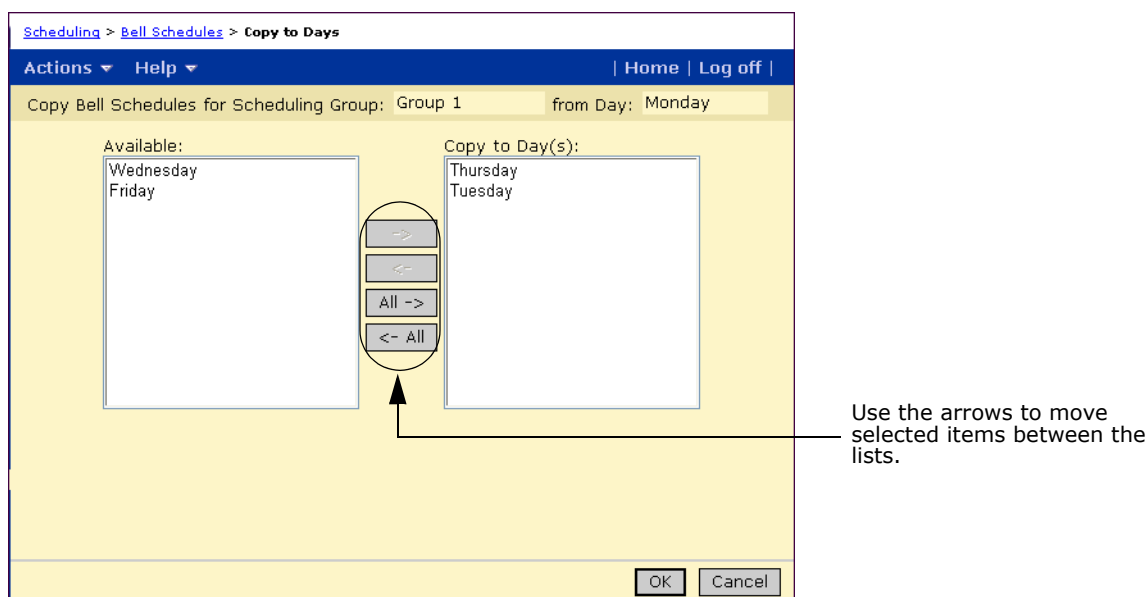
- 1 Log on as a school administrator.
- 2 In the control bar, click Scheduling.
- 3 On the Scheduling page, under Step 2, click Bell Schedules.
- 4 On the Bell Schedules page, after you define periods for one day, click "Copy to Other Days" beside the Day heading. For information about adding periods, see "Setting Up Bell Schedule Periods" on page 185.



To copy a period to another day of the week, select the period and then click the Copy to Other Days.

The Copy to Days page displays the day you are copying from and the days that are available to be copied.

- 5 In the Available column, select the days you want to copy and move them to the Copy to Days column.



- 6 Click OK. Click OK to confirm.

## Copying Periods in All Days to Another Scheduling Group

After you have set up periods for all days for a scheduling group, you can copy the bell schedule for all the days to other scheduling groups. This option makes it easy to set up the bell schedules for all your scheduling groups.

### NOTE

When you copy to another scheduling group, the bell schedule in the receiving scheduling group is overwritten. If you are making adjustments to an existing bell schedule, use caution when copying to other scheduling groups. Changing the bell schedules set up for an existing day may affect daily code calculation rules, meeting patterns, or exception day types.

After you copy periods, making changes to the periods in one day does not affect the periods in another day.

### To copy periods in all days to another scheduling group:

- 1 Log on as a school administrator.
- 2 In the control bar, click Scheduling.
- 3 On the Scheduling page, under Step 2, click Bell Schedules.
- 4 On the Bell Schedules page, after you define periods for all days in a scheduling group, click "Copy to Other Groups". For information about adding periods, see "Setting Up Bell Schedule Periods" on page 185.

The Copy to Groups page displays the scheduling group you are copying from and the scheduling groups that are available to be copied to.

- 5 From the Available column, select the scheduling groups you want to copy and move them to the "Copy to Scheduling Groups" column.
- 6 Click OK. Click OK to confirm.

## Setting Up Meeting Patterns

After you set up bell schedules, you can set up the meeting patterns. A meeting pattern is a series of periods when a class can meet. You define a meeting pattern, and then specify the periods and days it meets. Give meeting patterns descriptive names that indicate when the class meets.

Once the required meeting patterns are created for your school, the schedule structure is complete. When you set up classes, you can assign meeting patterns as appropriate. For more information about setting up classes, see "Defining Class Scheduling Options" on page 265.

### **To set up meeting patterns:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.

- 4 If you are using a planning calendar, on the Scheduling page, under Step 3, click Meeting Patterns.

OR

If you are using the active calendar, on the Scheduling page, under Step 2, click Meeting Patterns.

The screenshot shows the 'Meeting Patterns' page for 'Group 1'. It features a table with columns for Name, Short Name, and Description. One pattern, 'Period 1', is selected. Below this is a 'View of selected meeting patterns' section containing an 'Update View' button and a timetable grid. The grid shows days of the week (M-F) and time slots (7 AM to 3 PM). Meeting patterns P1 through P8 are shown in various cells, indicating their scheduled times. Annotations with arrows point to the table and the 'Update View' button.

The Meeting Patterns page shows the following information:

Field or Section	Description
Meeting Patterns for Scheduling Group	Select the meeting patterns you want to work with.
Name	Specifies the name of the meeting pattern.
Short Name	Specifies the short name of the meeting pattern. When entering short names, use meaningful names so you know what they mean when displayed on other pages.
Description	Displays a summary of the days and periods when this meeting pattern meets.
View of selected meeting patterns	Displays a timetable grid. You can select one or more meeting patterns then click Update View to see how the meeting patterns fit in a timetable grid.
Update View	Updates the timetable grid with the selected meeting patterns. After you select or deselect meeting patterns, click Update View to update the timetable grid.

- 5 On the Meeting Patterns page, in Meeting Patterns for Scheduling Group, select the scheduling group you want to work with.
- 6 Do one of the following:

To	Do this
Add a meeting pattern	<ul style="list-style-type: none"> <li>• In the Actions menu, click Add Meeting Pattern.</li> </ul>
Edit a meeting pattern	<ul style="list-style-type: none"> <li>• Select a meeting pattern. From the Actions menu, click Edit Meeting Pattern.</li> </ul> <p>OR</p> <p>Click the name of the meeting pattern you want to edit.</p>
Delete a meeting pattern	<ol style="list-style-type: none"> <li>1 Select the meeting pattern.</li> <li>2 From the Actions menu, click Delete Meeting Pattern. Skip the remaining steps.</li> </ol>

If you add or edit a meeting pattern, the Add Meeting Pattern or Edit Meeting Pattern page opens.

Shows the periods defined in the bell schedule. For more information about setting up the bell schedule, see "Setting Up Bell Schedules" on page 184.



- 7** On the Add Meeting Pattern page or Edit Meeting Pattern page, specify or edit the following information for the meeting pattern.

Field	Description
Meeting Pattern Name	Enter a descriptive name for this meeting pattern so that you can easily see when this meeting pattern meets.
Short Name	Enter a descriptive short name for this meeting pattern. Use meaningful short names so you know what they mean when displayed on other pages.
Meeting Pattern	Select the periods when this meeting pattern meets. For example, if this meeting pattern meets in period 1 on Day 2 and Day 4, select Day 2, Period 1 and Day 4, Period 1.

- 8** Click OK.

## Setting Up Meeting Patterns for Blocked Periods - Example

If your school wants to offer classes in blocked periods, create meeting patterns that use multiple, consecutive periods.

### NOTE

Do not use the Add More Detail link on the Master Schedule page to create double periods by assigning multiple meeting patterns to the class. The More Detail option creates multiple rows for the class in the database, which can be confusing on other pages, such as the Class Search page.

### To create a blocked period meeting pattern:

- 1** Log on as a school administrator.
- 2** In the control bar, under Admin, click Scheduling.
- 3** If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.
- 4** If you are using a planning calendar, on the Scheduling page, under Step 3, click Meeting Patterns.  
OR  
If you are using the active calendar, on the Scheduling page, under Step 2, click Meeting Patterns.
- 5** On the Meeting Patterns page, in Meeting Patterns for Scheduling Group, select the scheduling group you want to work with.
- 6** In the Actions menu, click Add Meeting Pattern.
- 7** On the Add Meeting Pattern page, enter a name and short name for the blocked meeting pattern; for example, enter Period 1-2 and P1-2.

- 8 On the Meeting Pattern panel, select the periods to include in the blocked meeting pattern.

Scheduling > Meeting Patterns > Edit Meeting Pattern

Actions Help | Home | Log off |

Meeting Pattern for Scheduling Group: All

\*Meeting pattern name:

\*Short name:

Meeting Pattern

	M	T	W	R	F	S
7 AM						
8 AM	P1 <input checked="" type="checkbox"/>	P1 <input checked="" type="checkbox"/>	W1 <input type="checkbox"/>	T1 <input type="checkbox"/>	P1 <input checked="" type="checkbox"/>	
9 AM	P2 <input checked="" type="checkbox"/>	P2 <input checked="" type="checkbox"/>			P2 <input checked="" type="checkbox"/>	P1 <input type="checkbox"/>
10 AM	P3 <input type="checkbox"/>	P3 <input type="checkbox"/>	W2 <input type="checkbox"/>	T2 <input type="checkbox"/>	P3 <input type="checkbox"/>	
11 AM	P4 <input type="checkbox"/>	P4 <input type="checkbox"/>			P4 <input type="checkbox"/>	
12 PM	P5 <input type="checkbox"/>	P5 <input type="checkbox"/>	W3 <input type="checkbox"/>	T3 <input type="checkbox"/>	P5 <input type="checkbox"/>	
1 PM	P6 <input type="checkbox"/>	P6 <input type="checkbox"/>			P6 <input type="checkbox"/>	
2 PM	P7 <input type="checkbox"/>	P7 <input type="checkbox"/>	W4 <input type="checkbox"/>	T4 <input type="checkbox"/>	P7 <input type="checkbox"/>	
3 PM	P8 <input type="checkbox"/>	P8 <input type="checkbox"/>			P8 <input type="checkbox"/>	

\*Required

OK Cancel

Select the periods the blocked class meets in; for example, this meeting pattern offers classes in period 1 and 2 on Mondays, Tuesdays, and Fridays.

- 9 Click OK.

## Viewing Meeting Patterns

You can view a visual representation of defined meeting patterns.

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, click Meeting Patterns.

- On the Meeting Patterns page, select the meeting pattern you want to view.

Scheduling > Meeting Patterns

Actions Edit Help | Home | Log off |

Meeting Patterns for Scheduling Group: Homerooms Prev Next

Selected: 1 Total: 2

Name	Short Name	Description
<input checked="" type="checkbox"/> Meeting Pattern 1	MP1	M(p1), T(p1), W(p1), F(p1)
<input type="checkbox"/> Meeting Pattern 2	MP2	M(p2), T(p2), W(p2), F(p2)

To add a meeting pattern, from the Actions menu, select Add Meeting Pattern

View of selected meeting patterns

Update View

	M	T	W	F
9 AM	p1	p1	p1	p1
10 AM	p2	p2	p2	p2
11 AM				

Select the meeting pattern you want to view.

- Click Update View.

Scheduling > Meeting Patterns

Actions Edit Help | Home | Log off |

Meeting Patterns for Scheduling Group: Homerooms Prev Next

Selected: 1 Total: 2

Name	Short Name	Description
<input checked="" type="checkbox"/> Meeting Pattern 1	MP1	M(p1), T(p1), W(p1), F(p1)
<input type="checkbox"/> Meeting Pattern 2	MP2	M(p2), T(p2), W(p2), F(p2)

To add a meeting pattern, from the Actions menu, select Add Meeting Pattern

View of selected meeting patterns

Update View

	M	T	W	F
9 AM	p1 MP1	p1 MP1	p1 MP1	p1 MP1
10 AM	p2	p2	p2	p2
11 AM				

Click Update View to see a visual representation of the meeting pattern.



# Configuring Student Loading Rules

The intent of student loading rules is to set up rules that automated scheduling processes use when scheduling specific courses, such as making sure some courses are always scheduled in sequence, or to balance the schedule so that electives are not all scheduled together.

Chancery SMS uses three types of student loading rules:

Student Loading Rule Type	Description
Constraints	Use these rules to control the distribution of students in classes.
Class Loading Rules	Use these rules to: <ul style="list-style-type: none"><li>• control the sequence of classes on a student’s schedule</li><li>• match the attributes of selected classes for a student</li><li>• balance the class load between terms on a student’s schedule</li></ul>
Team Loading Rules	Use these rules if your school schedules students in teams that take the same classes with the same teachers.

Student loading rules are available in both the active and planning calendars. In the active calendar, these rules are under the Step 3 “Configure student loading rules”. In the planning calendar, these rules are under Step 4 “Configure student loading rules”.

After you define the scheduling structure using the instructions in “Setting Up the Scheduling Structure” on page 171, you can define student loading rules for constraints, classes, and teams.

## NOTE

Do not create more rules than you need for the following reasons:

- **The more rules you have, the harder and longer the Student Loader or Walk-in Scheduler has to work to create the student schedule. If there are too many restrictive rules, the Student Loader or Walk-in Scheduler might not be able to find a suitable schedule.**
- You might inadvertently create loading rules that conflict with each other, especially when there are many rules. If you are unable to build a schedule, check the loading rules to make sure they do not conflict.

## Setting Up Constraints

You can use constraints to control the distribution of students in classes. Schools that use elementary scheduling can assign constraints to classes or homerooms.

For secondary schools, Chancery SMS supports two types of constraints: Restrictions and Capacity Balancing.

- **Restrictions**  
Restrictions allow you to control the distribution of students in classes according to specific criteria. For example, you can ensure that at least 10 percent of the students in a class are girls or restrict specific classes to students for whom English is their second language.

- Capacity Balancing

Capacity Balancing constraints ensure that automated loading processes distribute students evenly among available classes based on certain criteria. For example, you may want to ensure that students whose ethnicity is “African American” are distributed evenly among all available classes rather than all being scheduled to the same class.

Capacity Balancing constraints apply only to automated scheduling processes.

Constraints can be created at the district or at the school. Constraints created at the district are available to all schools in the district. If you modify a district-defined constraint at a school, Chancery SMS creates a copy of the constraint at the school level. Schools cannot delete district-defined constraints. When you create or edit constraints at the school, you can also make the constraint mandatory for specific subjects and/or homerooms.

Once constraints are defined, you apply or remove the constraint for specific classes and/or for homerooms. If a constraint is mandatory for a subject or homeroom, you cannot remove it from any class for that subject or homeroom.

**NOTE**

When creating student schedules, the Student Loader only considers constraints if the Use Capacity Balancing Constraints or Use Restriction Constraints option is selected on the Student Loader Options page. For more information about Student Loader options, see “Setting Student Loader Options” on page 307.

## Creating and Editing Restriction Constraints

Restrictions allow you to control the distribution of students in classes according to specific criteria. For example, you can ensure that at least 10 percent of the students in a classes are girls or restrict specific classes to students for whom English is their second language.

Creating and editing constraints involves setting up three steps:

- Step 1: Define Constraints
- Step 2: Select Student Criteria
- Step 3: Select Courses

### Step 1: Define Constraints

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are in the active calendar, on the Scheduling page, under Step 3, click Constraints.  
OR

If you are using a planning calendar, on the Scheduling page, under Step 4, click Constraints.

**4** On the Constraints page, do one of the following:

To	Do this
Add a constraint	<ul style="list-style-type: none"> <li>From the Actions menu, click Add Constraint.</li> </ul>
Modify a constraint	<ul style="list-style-type: none"> <li>Click the constraint name.</li> </ul> <p>OR</p> <p>Select the constraint. From the Actions menu, click Edit Constraint.</p> <p><b>NOTE</b> If you modify a district-defined constraint, it is saved at the school as a school-defined constraint. The district-defined constraint is not changed and is still available at the district and at the school.</p>
Delete a constraint	<ol style="list-style-type: none"> <li>Select the constraint.</li> <li>From the Actions menu, click Delete Constraint.</li> </ol> <p>Skip the remaining steps.</p> <p>You cannot delete a district-defined constraint.</p>

**5** On the Edit Constraints page, expand the Define Constraint panel and enter or edit the following information:

Field	Description
Name	<p>Enter a name for the constraint. The name must be unique within the school.</p> <p><b>NOTE</b> If you modify a district-defined constraint, a school-defined version of the constraint is saved for your school. The district-defined version is not changed and is still available to apply to classes.</p>
Defined at	View-only. Indicates whether the constraint was defined at the district or at the school.
Program Constraint	<p>Select this checkbox if the constraint applies to the specialized activities or courses outside of regular academic studies available through Program Management.</p> <p>For more information about Program Management, see the Chancery SMS Program Management Guide.</p>
Track Program Attendance for Classes with this Constraint	<p>This checkbox is available if the Program Constraint checkbox is selected.</p> <p>Select this checkbox if you want Program Management to include classes that are assigned this restriction in instructional minute calculations.</p> <p>For more information about Program Management, see the Chancery SMS Program Management Guide.</p>
Constraint Type	<p>Select the type of constraint.</p> <p>When editing a constraint, you cannot change the constraint type.</p>

- 6 Under “Complete the following phrase to define the constraint”, enter the following information to construct the constraint statement:

Field	Description
First dropdown	Select the constraint strength, that is, whether the constraint must be applied or should be applied.  If you select “Must contain”, automated scheduling processes will not schedule students if the constraint is not satisfied. When manually scheduling students that do not meet the criteria, you must have the Override Constraints permission set to “Yes” to add the student to the class.  If you select “Should contain”, automated scheduling processes attempt to meet the specified constraint criteria, but if another class is not available, Chancery SMS will schedule students who do not match the criteria. When manually scheduling students that do not meet the criteria, Chancery SMS displays a warning but does not prevent the student from being added to the class.
Second dropdown	Select the constraint range from the following options: <ul style="list-style-type: none"> <li>• At most - the maximum number of students that can have the specified criteria.</li> <li>• All - all students assigned to this class must have the specified criteria. This option is equivalent to “must contain 100%”.</li> <li>• No - no students assigned to this class can have the specified criteria. This option is equivalent to “must contain 0%”.</li> </ul>
Text box	Enter the constraint value, that is, the number or percent of students required for the constraint.  For percent values, enter a number between 0 and 100. For numeric values, enter a number between 0 and 9999.
%/#	Select whether the Constraint Value is a number or a percentage.
Third dropdown	Select the constraint matching criteria. Students can either match or not match the defined criteria.

- 7 Continue with “Step 2: Select Student Criteria” on page 200.

## Step 2: Select Student Criteria

After you define the constraint, you must specify the criteria that students must match to be eligible for the classes the constraint is assigned to.

Restriction Constraints use the Eligibility control to construct eligibility criteria. For more information about using the Eligibility control, see “Working with the Eligibility Control” on page 205.



**To select student criteria:**

- 1** On the Add Constraint or Edit Constraint page, expand the Select Student Criteria panel.
- 2** If the Program Constraint check box is not selected under the Define Constraint panel, construct criteria statements for the eligibility rule using the eligibility control. For more information about using the eligibility control, see "Creating and Editing Capacity Balancing Constraints" on page 202.

To	Do this
Add a criteria statement to the eligibility rule	<ol style="list-style-type: none"> <li><b>1</b> From the Category dropdown, select the type of data to be added.</li> <li><b>2</b> Under Search By, from the first dropdown, select the field or function.</li> <li><b>3</b> From the second dropdown, select the appropriate operator (e.g., equals).</li> <li><b>4</b> In the third field, enter or select the appropriate value. If you selected a function in Step 2, additional dropdowns are available under "Where the following conditions apply".</li> <li><b>5</b> If available, under "Where the following conditions apply", from the first dropdown, select the condition.</li> <li><b>6</b> If available, from the second dropdown, select the appropriate operator (e.g., equals).</li> <li><b>7</b> If available, from the third dropdown, select a value.</li> <li><b>8</b> Click Add Criteria.</li> </ol>
Delete a criteria statement from the eligibility rule	<ol style="list-style-type: none"> <li><b>1</b> In the Eligibility Criteria list box, click the statement to highlight it.</li> <li><b>2</b> Click Remove.</li> </ol>
Add a logical operator to define the relationships between statements	<ol style="list-style-type: none"> <li><b>1</b> Click AND or OR.</li> <li><b>2</b> Add a criteria eligibility statement to the logical operator.</li> </ol> <p><b>NOTE</b> Eligibility rules using multiple criteria must conform to the "Rule of Two". Each operator must have a pair of items nested underneath. Item pairs can be either two criteria OR one criteria and an operator (AND/OR).</p>
Move a statement to another location in the eligibility rule	<ul style="list-style-type: none"> <li>• Click and drag the statement to the new location.</li> </ul>
Validate the rule	<ul style="list-style-type: none"> <li>• Click Validate.</li> </ul>

- 3** If Program Constraint is selected under the Define Constraint panel, specify the programs the constraint applies to by entering the following information:

Field	Description
Program Category	Select the appropriate program category.
Program	Select the program the constraint applies to.

Field	Description
Available sessions/Selected sessions	To assign the constraint to a session, select the session from the Available Sessions list and move it to the Selected Sessions list. To remove the constraint from a session, select the session from the Selected Sessions list and move it to the Available Sessions list.

- Continue with "Step 3: Select Courses" on page 202.

### Step 3: Select Courses

Once you have defined a constraint (see "Step 1: Define Constraints" on page 198) and selected student criteria (see "Step 2: Select Student Criteria" on page 200), you are ready to assign the constraint to courses.

When you assign constraints to a course, you indicate how the constraint applies to classes for that course. Constraints may apply by default, be available, or be mandatory for courses.

#### To assign constraints to courses:

- On the Add Constraint or Edit Constraint page, expand the Select Courses panel.
- Search for courses or click Display All Records.
- In the list of available courses, select the courses you want to apply the constraint to and move them to the Selected Courses list.
- From the Constraint Is dropdown, select one of the following options:

Option	Description
Available	The constraint is available to classes for this course. It is not automatically assigned to classes.
Default	The constraint is applied by default to newly created classes for this course, but can be removed for specific classes.
Mandatory	The constraint is required for all classes for this course and cannot be turned off for any class.

- Click OK.

## Creating and Editing Capacity Balancing Constraints

#### NOTE

Capacity Balancing constraints apply only to automated scheduling processes.

Capacity Balancing constraints ensure that automated loading processes distribute students evenly among available classes based on certain criteria. For example, you may want to ensure that students whose ethnicity is "African American" are distributed evenly among all available classes rather than all being scheduled to the same class. Capacity Balancing constraints do not apply when you manually assign students to classes.

Creating and editing constraints involves three steps:

- Step 1: Define Constraints
- Step 2: Select Student Criteria
- Step 3: Select Courses

## Step 1: Define Constraints

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are in the active calendar, on the Scheduling page under Step 3, click Constraints.  
OR  
If you are using a planning calendar, on the Scheduling page under Step 4, click Constraints.
- 4 On the Constraints page, do one of the following:

To	Do this
Add a constraint	<ul style="list-style-type: none"> <li>• From the Actions menu, click Add Constraint.</li> </ul>
Edit a constraint	<ul style="list-style-type: none"> <li>• Click the name of the Capacity Balancing constraint. OR Select the Capacity Balancing constraint. From the Actions menu, click Edit Constraint.</li> </ul>
Delete a constraint	<ol style="list-style-type: none"> <li>1 Select the constraint.</li> <li>2 From the Actions menu, click Delete Constraint.</li> <li>3 Click OK and skip the remaining steps.</li> </ol> <p><b>NOTE</b> You cannot delete a district-defined constraint.</p>

If you add or edit a constraint, the Add Constraint or Edit Constraint page opens.

- 5 On the Edit Constraints page, expand the Define Constraint panel and enter or edit the following information:

Field	Description
Name	Enter a name for the constraint. The name must be unique within the school.  <p><b>NOTE</b> If you modify a district-defined constraint, a school-defined version of the constraint is saved for your school. The district-defined version is not changed and is still available to apply to classes.</p>
Defined at	View-only. Indicates whether the constraint was defined at the district or at the school.
Program Constraint	Select this checkbox if the constraint applies to specialized activities or courses outside of regular academic studies available through Program Management.  For more information about Program Management, see the Chancery SMS Program Management Guide.
Track Program Attendance for Classes with this Constraint	This checkbox is available if the Program Constraint checkbox is selected.  Select this checkbox if you want Program Management to include classes that are assigned this restriction in instructional minute calculations.  For more information about Program Management, see the Chancery SMS Program Management Guide.

Field	Description
Constraint Type	Select Capacity Balancing.
Constraint Matching	Select whether the students must match or not match the specified criteria.
Constraint Description	Displays a description of the defined constraint. This field is updated when the constraint is saved or when you click Refresh.

- 6 Under "Complete the following phrase to define the constraint", select either "Matching the specified criteria" or "Not matching the specified criteria" from the dropdown.
- 7 Continue with "Step 2: Select Student Criteria" on page 204.

## Step 2: Select Student Criteria

After you define the constraint, you specify the characteristic you want to balance across classes. Depending on the category selected, you can balance classes for the following items:

Category	Fields available
Demographics	<ul style="list-style-type: none"> <li>• Age (current)</li> <li>• Ethnic Category</li> <li>• Federal ethnicity category</li> <li>• Gender</li> <li>• Geocode (active)</li> <li>• Geocode (planning)</li> <li>• Grade level (current)</li> </ul>

### To select student criteria:

- 1 On the Add Constraint or Edit Constraint page, expand the Select Student Criteria panel and do one of the following:

If	Do this
The Program Constraint checkbox is not selected under the Define Constraint panel	<ol style="list-style-type: none"> <li>1 From the Category dropdown, select the type of data to be added.</li> <li>2 From the Balance By dropdown, select the field you want classes to be balanced by. For example, to have an equal number of boys and girls in classes, select Gender.</li> </ol>
The Program Constraint checkbox is selected under the Define Constraint panel	<ol style="list-style-type: none"> <li>1 From the Program Category dropdown, select the appropriate program category.</li> <li>2 From the Program dropdown, select the program the constraint applies to.</li> <li>3 In the Available Sessions list, select the program sessions you want the constraint to apply to and move the sessions to the Selected Sessions list.</li> </ol>

- 2 Continue with "Step 3: Select Courses" on page 205.

### Step 3: Select Courses

Once you have defined a constraint (see "Step 1: Define Constraints" on page 203) and selected student criteria (see "Step 2: Select Student Criteria" on page 204), you are ready to assign the constraint to courses.

When you assign constraints to a course, you indicate how the constraint applies to classes for that course. Constraints may apply by default, be available, or be mandatory for courses.

#### To assign constraints to courses:

- 1 On the Add Constraint or Edit Constraint page, expand the Select Courses panel.
- 2 Search for courses or click Display All Records.
- 3 In the list of available courses, select the courses you want to apply the constraint to and move them to the Selected Courses list.
- 4 From the Constraint Is dropdown, select one of the following options:

Option	Description
Available	The constraint is available to classes for this course. It is not automatically applied to classes.
Default	The constraint is applied by default when classes for this course are created, but can be turned off for specific classes.
Mandatory	The constraint is required for all classes for this course and cannot be turned off for any class.

- 5 Click OK.

### Working with the Eligibility Control

The Eligibility control allows you to construct eligibility rules. For constraints, the eligibility rules are used to determine if students are eligible for classes based on the applied constraints.

The Eligibility control is made up of two sections:

- The statement builder – a collection of fields known as Search By sets that you can use to construct the individual criteria statements.

- The Eligibility Criteria section – a list box that contains the entire eligibility rule, including the logical operators (AND/OR) that connect the statements.

The screenshot shows the 'Statement Builder' interface. At the top, the 'Category' is set to 'Enrollment'. The 'Search By' section contains 'Student is active' with an operator of 'equals' and a value of 'True'. Below this, a 'Where' clause is defined: '\*Effective date: equals Today'. An 'Add Criteria' button is visible. The 'Eligibility Criteria' section contains a list of criteria:
 

- Criteria
- AND
- OR
- AND
- Grade level equals 9
- Cumulative GPA is greater than 3.3
- AND
- Grade level equals 10
- Cumulative GPA is greater than 3.5
- Days absent unexcused is less than or equal to 1

 Buttons for 'AND', 'OR', 'Validate', and 'Remove' are present. At the bottom, a complex logical expression is displayed:
 

```
(((Grade level equals 9 where effective date equals Today )AND(Cumulative GPA is greater than 3.3 where cumulative GPA definition equals Weighted Cum GPA ))OR((Grade level equals 10 where effective date equals Today )AND(Cumulative GPA is greater than 3.5 where cumulative GPA definition equals Weighted Cum GPA )))AND(Days absent unexcused is less than or equal to 1 where start date equals Start of District Calendar and end date equals End of District Calendar ))
```

### Using the Statement Builder

The statement builder has three sections: a Category selector, a primary Search By statement, and, for some statements, an additional set of “where” clauses. To add a statement to the eligibility criteria, click Add Criteria.

This annotated screenshot shows the 'Statement Builder' interface with several labels:
 

- Left term:** Points to the 'Enrolled in district program' dropdown in the 'Search By' section.
- Operator:** Points to the 'equals' dropdown in the 'Search By' section.
- Right term:** Points to the 'True' dropdown in the 'Search By' section.
- Category of student data:** Points to the 'Program Management' dropdown in the 'Category' section.
- Search By statement:** Points to the entire 'Search By' section.
- Where clause (appears if function selected in Search By statement):** Points to the 'Where the following conditions apply:' section, which includes fields for '\*Start date', '\*End date', '\*Program category', and '\*Program'.
- Add Criteria:** Points to the 'Add Criteria' button at the bottom right.

 A note at the bottom right states: 'Click to add the statement to the eligibility criteria.'

To construct a statement, you first select a category of student data. For example, Demographics.

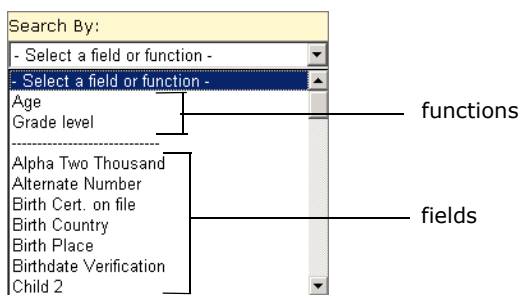
In each category, you will find all the existing properties in the database that could be relevant to calculating eligibility for that particular category.

The Search By section is made up of a left term, an operator (e.g., equals, is greater than or equal to, contains, etc.), and a right term. Using these components, you construct the main search statement to be added to the eligibility control.

**IMPORTANT NOTE**

All eligibility rule criteria open text field searches are case sensitive.

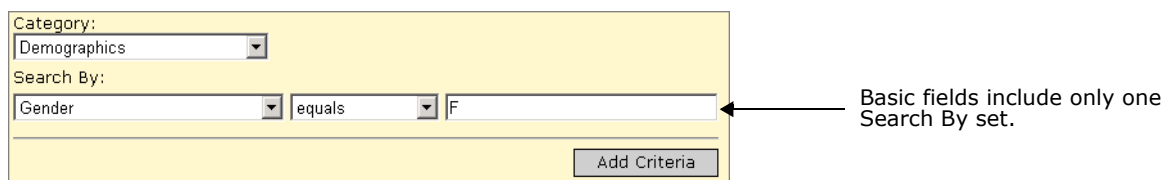
Depending on the category you select, from the left term, you can select either a field or a function.



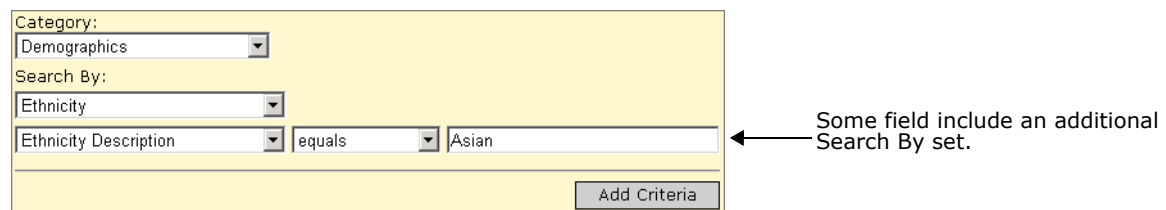
The options available for specifying a criteria depends on whether you select a field or a function from the from the left term dropdown:

- Field

In it's simplest form, a field is any single piece of data stored in the database, such as a student's gender. When you select a basic field as the left term, you can specify an operator and right term then add the statement to the eligibility rule; no additional controls are generated.



Some fields include an additional Search By set below the first, which allows you to search for specific information related to the selected field. For example, if you select a setup list, such as Ethnicity, an additional dropdown allows you to select another left term, such as description or code, and specify an operator and right term; for example, "Ethnicity Description equals Asian".



- Function

A function is a predefined tool used to construct statements about complex data that require you to specify limiting or “where” clauses. For example, if you specify that a student must have a cumulative GPA of 3.5, the system will look at all cumulative GPA definitions. However, if you use a cumulative GPA function, additional Search By sets are automatically generated to allow you to select a specific GPA definition.

When you select a function, a section called “Where the following conditions apply” appears below the Search By section. Any limiting terms necessary to extract the appropriate data are preset. Once you select the operator and right term for the first Search By set and all associated where clauses, you can add the statement to the eligibility rule.

**NOTE**

For some functions, the options available in the right term dropdown for some parameters depend on whether you are defining the rule at the district level or at the school level. If you are defining the rule at the district level, you can select from a list of values defined at any school in the district. If you are defining the rule at the school level, you only see values defined at that school. If an eligibility rule is created at the district using a value that is defined at some but not all schools, and then the rule is run at a school that does not have the value defined, no students at the school will match the criteria.

For example, suppose a district has two schools that each create a cumulative GPA definition. School A calls the definition “Weighted Cum GPA” and School B calls the definition “Weighted Cumulative GPA”. Then, at the district, you create an eligibility rule. When you set the Cumulative GPA definition parameter, the list of Cumulative GPA definitions includes both “Weighted Cumulative GPA” and “Weighted Cum GPA”. If you create the eligibility rule that specifies the “Weighted Cum GPA” definition, when the rule is run at School B, no students match the criteria.

For a description of the functions available for each category, see the Chancery SMS Eligibility Technical Bulletin.

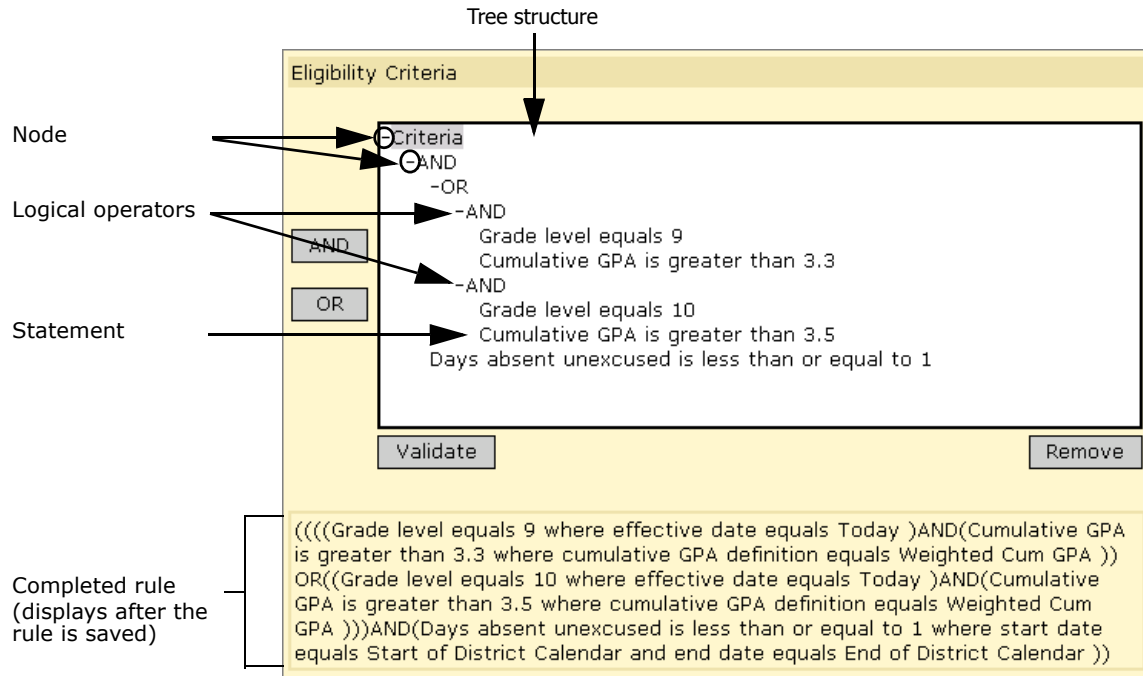
When you select a function in the first Search By dropdown, you can specify conditions in the “Where the following conditions apply” section.

For some functions, the values available in this dropdown depend on whether you are defining the rule at the district level or at the school level.



## Creating Eligibility Rules

The Eligibility Criteria section of the control groups together the individual statements into an eligibility rule.



The eligibility rule as a whole is displayed in the list box in the Eligibility Criteria section. This list box is organized in a tree structure, similar to the folders on a computer, and the branches of this tree are called nodes. When you construct a statement and click Add Criteria, the statement is added below the selected node, or to the bottom of the rule if a node was not selected.

If you have more than one statement in your rule, you must add logical operators to group them meaningfully. For example, if students are required to meet all the criteria in your rule, the first node under Criteria should be AND; all the statements would then hang off that node. If, on the other hand, students are only required to meet one out of a list of criteria, the first node should be OR. Additional nodes can be added to allow a combination of these operators.

To add operators, click the node to which you want to add the operator and then click the AND or OR button. You can then drag the statements to the appropriate node. You can also drag whole nodes to different locations in the list box or remove statements completely.

### NOTE

When dragging a statement or operator, make sure the cursor is directly above the node before releasing it.

## Eligibility Rules and Null or Empty Values

When the Chancery SMS eligibility control processes eligibility rule criteria that references a field that is empty, it evaluates as false unless it uses the "is empty" operator.

For example, if the student's Date of Birth field is empty, the following criteria would evaluate as true:

age is empty

However, the following criteria would evaluate as false:

age does not equal 12

For best results, before calculating eligibility, make sure student data is complete and correct.

## Applying Constraints to Classes

After you set up constraints, you can apply or remove them for specific classes. The constraints in the Available Constraints, Selected Constraints, and Mandatory Constraints lists depend on how constraints were assigned to courses. (See "Step 3: Select Courses" on page 202 or "Step 3: Select Courses" on page 205).

If a constraint is available to a course, it is available to all classes for the selected course, but is not applied unless selected for specific classes. If a constraint is set to default for a course, it is applied when classes for that course are created. You can manually remove the constraint from classes. If the constraint is mandatory for a course, it is automatically applied when classes for that course are created and it cannot be removed.

Chancery SMS provides two methods for applying constraints to specific classes:

- From the Apply Constraints page - shows detailed information about the constraints. For more information, see "Applying Constraints Using the Apply Constraints Page" on page 210.
- From the Master Schedule page - shows detailed information about classes, but only the names of constraints.

### NOTE

The Student Loader only considers constraints if the Use Capacity Balancing Constraints or Use Restriction Constraints option is selected on the Student Loader Options page. For more information about Student Loader options, see "Setting Student Loader Options" on page 307.

## Applying Constraints Using the Apply Constraints Page

The Apply Constraints page shows detailed information about the constraints you are working with.

### To apply constraints to classes:

- 1 Log on as a school administrator.
- 2 In the control bar, click Scheduling.
- 3 On the Scheduling page, click Constraints.
- 4 In the list of constraints, select the constraint you want to apply to classes. From the Actions menu, click Apply Constraint.

OR

Click the number in the # of Classes column.

- 5** On the Apply Constraints page, review the following information about the constraint:

Field	Description
Type	Displays the type of constraint: Restriction or Capacity Balancing.
Program Const	Indicates whether the constraint applies to the specialized activities or courses outside of regular academic studies available through Program Management. For more information about Program Management, see the Chancery SMS Program Management Guide.
Track Program Att	Indicates whether Program Management includes classes that are assigned this restriction in instructional minute calculations. For more information about Program Management, see the Chancery SMS Program Management Guide.
Strength	Indicates how the constraint is applied to courses. Available indicates that it is available to all classes for the selected course, but is not applied unless selected for specific classes. Default indicates that it is applied when classes for that course are created. You can manually remove the constraint from classes. Mandatory indicates that it is automatically applied to all classes for that course and it cannot be removed.
Name	Shows the name of the constraint.
Description	Shows the definition of the constraint.

- 6** Expand the Classes panel or Select Classes panel and search for courses.
- 7** If the constraint is mandatory, the Classes field shows a list of classes for the course.  
OR  
If the constraint strength is set to default or available, the page includes a list of available classes and the classes the constraint has been applied to (Selected Classes).
- 8** For default or available constraints, to apply the constraint to classes, select classes in the Available Classes list and move them to the Selected Classes list.  
OR  
To remove the constraint for classes, select the classes in the Selected Classes list and move them to the Available Classes list.
- 9** Click OK.

## Setting Up Class Loading Rules

Class loading rules are used by the Student Loader and the Walk-in Scheduler to control the loading of student schedules. The Student Loader uses all class loading rules when it loads student schedules. Master Schedule Builder only uses the rules that affect building the master schedule, such as attribute rules.

For example, to make sure Chemistry Lab immediately follows Chemistry, you can set up a course sequencing rule to “always schedule Chemistry 11 to end in a period immediately

before Chemistry Lab 11 begins”. An identical rule is to “always schedule Chemistry Lab 11 to begin in a period immediately after Chemistry 11 ends”.

You can also set up course balancing rules so that academic courses are not all scheduled in one semester and electives in the other. By default, based on semester (not full year) courses, Student Loader or Walk-in Scheduler tries to schedule an equal number of courses in each semester. This schedule is based on all course requests and not within each course.

Rule parameters like Always Schedule and Never Schedule are “hard” rules, while parameters like Try to Schedule and Try Not to Schedule are “soft” rules. The Student Loader will follow hard rules and not schedule a student unless the hard rules are met. The Student Loader will try to follow soft rules, but create a student schedule, even if the soft rules cannot be met.

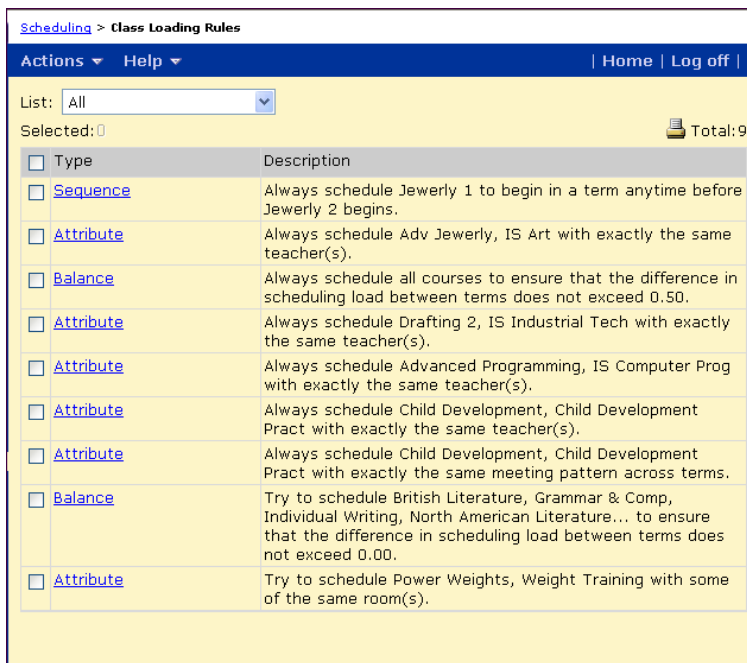
**To define class loading rules:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.
- 4 If you are using a planning calendar, on the Scheduling page, under Step 4, click Class Loading Rules.

OR

If you are using the active calendar, on the Scheduling page, under Step 3, click Class Loading Rules.

The Class Loading Rules page displays any rules you have created, including the type and description of each rule.



- 5 To add a scheduling rule, from the Actions menu, click Add Rule.

OR

To edit a scheduling rule, click the rule you want to modify.

- 6 On the Add or Edit Class Loading Rule page, specify the scheduling rule type and the rule parameters.

**NOTE**

Once you have created a rule, you cannot change the rule type.

Rule Type	Description
Course Sequencing Rule	Use to schedule class sequences, such as when one class must or must not follow another. For more information about setting up course sequencing rules, see “Defining Course Sequencing Rules” on page 214.  For example, use this type of rule to schedule a science lab right after the science class, or to make sure different language classes, such as Spanish and French, do not follow each other.
Same/Different Attributes Rule	Use to schedule classes with the same or different teachers, terms, periods, rooms, class numbers, or meeting patterns across terms. For more information about setting up same/different attribute rules, see “Defining Same/Different Attribute Rules” on page 215.  For example, use this type of rule to schedule several classes with the same teacher, or to make sure different classes meet in the same room.

Rule Type	Description
Course Balancing Rule	Use to schedule students so that classes of a particular group are spread across terms on their schedules. For more information about setting up course balancing rules, see "Defining Course Load Balancing Rules" on page 217.  For example, use this type of rule to ensure that students with requests from a list of difficult academic courses do not have all the difficult courses scheduled in one semester.

## Defining Course Sequencing Rules

Use course sequencing rules to tell the Master Schedule Builder how to sequence specific courses, such as when you want to ensure that a specific course does or does not follow another course. For example, a course sequencing rule might be: "Never schedule Spanish to begin in a period immediately after French ends".

To help you understand the rule as you define it, the description is immediately displayed below the rule parameters.

### To create a course sequencing rule:

- 1 Log on as a school administrator.
- 2 Open the Add Class Loading Rules page.

For more information about opening the Add Class Loading Rules page, see "Setting Up Class Loading Rules" on page 211.

- 3 For Rule Type, select Course Sequencing Rule.

- 4 In the first dropdown, select how the course should be scheduled. The following options are available:
  - Always schedule
  - Never schedule
  - Try to schedule
  - Try not to schedule
- 5 Click the first Select Course link. Search for and select the first course you want to sequence. Click OK.
- 6 From the second dropdown, select one of the following options:
  - To begin in a term
  - To end in a term
  - To begin in a period
  - To end in a period
- 7 From the third dropdown, select one of the following options
  - Anytime before
  - Anytime after
  - Immediately before
  - Immediately after
- 8 Click the second Select Course link and search for and select the second course for the sequencing rule. Click OK.
- 9 From the fourth dropdown, select the relationship to the second course. The following options are available:
  - Begins
  - Ends
- 10 To save the rule and add another rule, click Save+Add.  
OR  
To save and exit the page, click OK.

## Defining Same/Different Attribute Rules

Use same/different attribute rules to tell the Master Schedule Builder how to schedule courses with the same or different teachers, terms, periods, rooms, class numbers, or meeting patterns across terms. You might use this rule type to schedule several classes with the same teacher or to ensure different classes are scheduled for the same room. For example, a same/different attribute rule might be: "Always schedule Government and Economics with exactly the same class number".

To help you understand the rule as you define it, the description is immediately displayed below the rule parameters.

**To create a same/different attribute rule:**

- 1 Log on as a school administrator.
- 2 Open the Add Class Loading Rules page.

For more information about opening the Add Class Loading Rules page, see “Setting Up Class Loading Rules” on page 211.

- 3 For Rule Type, select Same/Different Attribute Rule.
- 4 From the first dropdown, select how the courses should be scheduled. The following options are available:
  - Always schedule
  - Never schedule
  - Try to schedule
  - Try not to schedule
- 5 Click the Select Courses link.
- 6 Search for and select the courses you want to specify the rule for. Click OK.
- 7 From the second dropdown, select one of the following options:
  - With exactly the same
  - With some of the same
  - With all different
  - With some different



**8** From the third dropdown, select the attribute. The following options are available

- Term
- Period
- Teacher
- Class number
- Meeting pattern across terms

**9** To save the rule and add another rule, click Save+Add.

OR

To save and exit the page, click OK.

## Defining Course Load Balancing Rules

Use course load balancing rules to tell the Master Schedule Builder how to balance scheduling loads across terms to prevent students from having all the courses with heavy loads in one term. For example, a course load balancing rule might be: "Try to schedule all courses to ensure that the difference in scheduling load between terms does not exceed 0.5".

To help you understand the rule as you define it, the description is immediately displayed below the rule parameters.

### To create a course balancing rule:

- 1** Log on as a school administrator.
- 2** Open the Add Class Loading Rules page.

For more information about opening the Add Class Loading Rules page, see "Setting Up Class Loading Rules" on page 211.

The screenshot shows the 'Add Class Loading Rule' page. At the top, the breadcrumb is 'Scheduling > Class Loading Rules > Add Class Loading Rule'. Below the breadcrumb are 'Actions' and 'Help' menus, and 'Home | Log off' links. The 'Rule type' section has three radio buttons: 'Course sequencing rule', 'Same/different attributes rule', and 'Course load balancing rule' (which is selected). Below this, the instruction reads: 'Complete the following two phrases and select courses to define the rule.' Step 1 shows a dropdown menu with 'Always schedule' selected, followed by a 'Select courses' link and a checkbox for 'All courses'. Step 2 shows the text 'To ensure that the difference in scheduling load between terms does not exceed:' followed by a text input field containing '0.5'. At the bottom of the form, a text area displays the rule description: 'Always schedule [Course Name] to begin in a term anytime before [Course Name] begins'. At the very bottom are three buttons: 'Save+Add', 'OK', and 'Cancel'. Two arrows on the right side of the image point to the 'Select courses' link and the rule description text area, with labels 'Rule parameters' and 'Rule description' respectively.

- 3** For Rule Type, select Course Balancing Rule.

- 4 From the dropdown, select how the courses should be scheduled. The following options are available:
  - Always schedule
  - Never schedule
  - Try to schedule
  - Try not to schedule
- 5 Click the Select Courses link.
- 6 Search for and select the courses you want to specify the rule for. Click OK.  
OR  
Select All Courses.
- 7 In the second field, enter the scheduling load.
- 8 To save the rule and add another rule, click Save+Add.  
OR  
To save and exit the page, click OK.

## Setting Up Team Loading Rules

If your school schedules students in teams that take the same classes with the same teachers, you can set up team loading rules so the Student Loader or Walk-in Scheduler knows which students to keep together. By specifying which teams can or cannot overlap with which other teams, you can control which students take which classes together. When you set up team loading rules, use “allow overlap” and “do not allow overlap” to control which students take the same classes (overlapping) and which students take separate classes (no overlapping). For an example of how overlapping can be used, see “Example of Using Overlapping in Scheduling Teams” on page 219.

Setting up class teams involves the following general steps:

- 1 Define the teams. For more information about defining teams, see “Setting Up Teams” on page 220.
- 2 Assign teams to classes. For more information about assigning teams to classes, see “Assigning Teams to Classes” on page 221.
- 3 Use the Student Loader to load student schedules. For more information about loading student schedules, see “Loading Student Schedules” on page 307.

The Student Loader loads student schedules according to the rules defined for the teams. For example, if you specify that the Cougars team cannot overlap with the Panthers team, a student scheduled into the Cougars’ math class is not also scheduled for the Panthers’ English class.

OR

Manually load and lock students into team classes to ensure a student is assigned a specific team. For more information about manually loading students into classes, see “Manually Adding, Dropping, or Transferring Classes” on page 329 and “Locking Classes in Student Schedules” on page 344.

**NOTE**

Team loading rules are part of student loading rules. Do not confuse team loading rules with elementary school team teaching or assigning more than one teacher to a class. For information about team teaching in elementary schools, see “Working with Team Teaching” on page 83.

## Example of Using Overlapping in Scheduling Teams

This example illustrates how you might set up team teaching to control how students are scheduled into classes. Let’s say you set up the following teams:

Team name	Do not allow overlap with teams	Comment
Cougars	Lions, Tigers, Panthers	The four basic teams, which do not overlap with each other
Lions	Cougars, Tigers, Panthers	
Tigers	Cougars, Lions, Panthers	
Panthers	Cougars, Lions, Tigers	
Yellow Cats	Tigers, Panthers	Combined teams
Jungle Cats	Cougars, Lions	

Now, let’s say you have the following core and elective classes, each belonging to a team:

Class (Team)	Class (Team)
English 9-1 (Cougars)	Math 9-1 (Cougars)
English 9-2 (Lions)	Math 9-2 (Lions)
English 9-3 (Tigers)	Math 9-3 (Tigers)
English 9-4 (Panthers)	Math 9-4 (Panthers)
Photography 9-1 (Yellow Cats, which can only overlap with Cougars and Lions)	Band 9-1 (Yellow Cats, which can only overlap with Cougars and Lions)
Photography 9-2 (Jungle Cats, which can only overlap with Tigers and Panthers)	Band 9-2 (Jungle Cats, which can only overlap with Tigers and Panthers)

When Billy and Susie walk into your school with their course requests for the above courses, you can manually schedule Billy into a class in the Cougars team (such as English 9-1) and Susie into a class in the Lions team (such as English 9-2.) The Student Loader follows the above rules and creates a schedule for Billy and Susie like the following example.

Billy in Cougars team	Susie in Lions team
English 9-1 (Cougars)	English 9-2 (Lions)
Math 9-1 (Cougars)	Math 9-2 (Lions)
Photography 9-1 (Yellow Cats)	Photography 9-1 (Yellow Cats)
Band 9-1 (Yellow Cats)	Band 9-1 (Yellow Cats)

As a result, Billy and Susie take separate classes for English and Math because the Cougars team and the Lions team cannot overlap. They would take the same Photography 9-1 and Band 9-1 class because these classes can overlap with both the Cougars team and the Lions team.

## Setting Up Teams

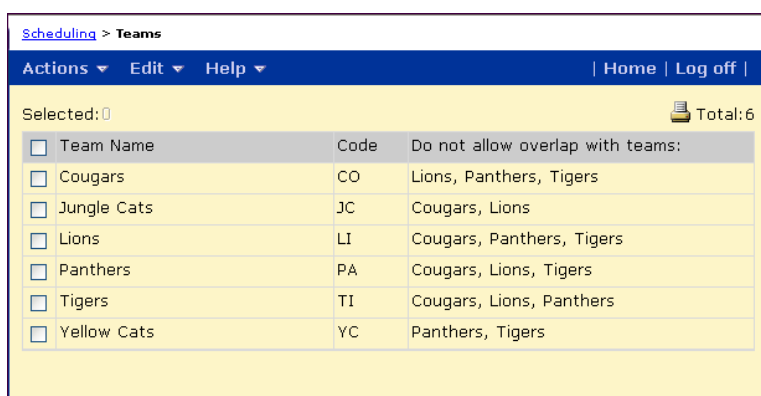
### To set up teams:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.
- 4 If you are using a planning calendar, on the Scheduling page, under Step 4, click Team Loading Rules.

OR

If you are using the active calendar, on the Scheduling page, under Step 3, click Team Loading Rules.

The Teams page opens.



- 5 To add a team, from the Actions menu, click Add Team.

OR

To edit a team, select the team you want to modify then, from the Actions menu, click Edit Team.

- 6 On the Add Team or Edit Team page, enter the following information:

Field	Description
Team Name	Enter a name for the team. The team name appears in the Team dropdown in the Master Schedule page when a class is selected.
Code	Enter a code for this team. Use meaningful short codes so they are clear when displayed on other pages.
Allow Overlap With Teams	By default, new teams can overlap with existing teams. For example, if you already have teams named Blue, Red, and Green, adding a Yellow team allows classes in the Yellow team to overlap with the existing teams, by default. If you do not want a team to overlap with another, click the team name then click <input type="checkbox"/> to move it to the "Do not allow overlap with teams" list.

Field	Description
Do Not Allow Overlap With Teams	Classes in the team cannot overlap with classes in these teams. For example, if you have a Blue team that is not allowed to overlap with the Yellow team, when Master Schedule Builder creates a schedule, students assigned to a class for the Blue team are not also scheduled for classes assigned to the Yellow team.
Team Members	Use the Search section to search for staff to add to the team as members. Add all staff members who can be assigned to teach classes assigned to the team.  When the Student Loader or Walk-In Scheduler creates a student's schedule, it will attempt to schedule the student into classes taught by the team members for the team the student is assigned to. For example, if the student is assigned to the Green team for Math, the Student Loader will attempt to schedule the student into an English class taught by a teacher who is a team member of the Green team.

- 7 Click OK.

#### To delete a team in team loading rules:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.
- 4 If you are using a planning calendar, on the Scheduling page, under Step 4, click Team Loading Rules.  
OR  
If you are using the active calendar, on the Scheduling page, under Step 3, click Team Loading Rules.
- 5 Select the team you want to delete. From the Actions menu, click Delete Team.
- 6 Click OK.

## Assigning Teams to Classes

Once you create teams and specify the team loading rules, you can assign the teams to classes. When a team is assigned to a class, the Student Loader and Walk-in Scheduler follow the team loading rules when they create student schedules.

#### To assign classes to teams:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.

- 4 If you are using a planning calendar, on the Scheduling page, under Step 5, click Master Schedule.  
OR  
If you are using the active calendar, on the Scheduling page, under Step 6, click Master Schedule.
- 5 On the Master Schedule page, search for a course or click Display All Records.
- 6 In the search results, select the class that you want to add to a team.  
Detailed information about the selected class is displayed below the search results panel.
- 7 In the Class Information panel, from the Team dropdown, select the team you want to assign to the class. Click Save.

## Assigning Specific Students to Teams

In general, you can set up team loading rules and allow the Student Loader to allocate students to teams automatically. For more information about automatically loading student schedules, see "Loading Student Schedules" on page 307.

However, if you want to ensure that specific students are assigned to certain teams, you can manually assign the student to a class for that team and lock the student in that class. Once the student has been locked into a class for a specific team, automated processes, such as the student loader, will only assign them to classes for that team. For more information about manually assigning student to classes, see the following topics:

- "Manually Adding, Dropping, or Transferring Classes" on page 329
- "Assigning Groups of Students to Classes" on page 354
- "Locking Classes in Student Schedules" on page 344

### NOTE

When you manually assign students to classes, you can assign them to team classes, regardless of the team loading rules that have been set up.

# Configuring Terms and Meeting Patterns for Courses

Use the Course Offerings page to define the terms and meeting patterns for the courses your school offers. In the planning calendar, you can have different course offerings for different planning schedules. Therefore, be sure you are working in the correct planning schedule when you set up course offerings.

## NOTE

Only offered courses appear on the Course Request Tally page.

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.
- 4 If you are using the active calendar, on the Scheduling page, under Step 4, click "Course Offerings & Meeting Patterns".

OR

If you are using a planning calendar, on the Scheduling page, under Step 5, click "Course Offerings & Meeting Patterns".

- 5 On the Course List page, locate and click the course number you want to work with. In the control bar, click Course Offerings.

Scheduling > Course List > Course Offerings

English 10

Scheduling Group	Term Set	Default Offering	Allowed Offering	Meeting Patterns
<a href="#">All</a>	<a href="#">Full Year</a>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	7
<a href="#">All</a>	<a href="#">Semesters</a>	<input type="radio"/>	<input type="checkbox"/>	0

Select a default offering to make the course available for scheduling (deselect the default to remove the course from scheduling). This will determine the term set used for classes when they are initially created. Select allowed offerings to allow users to schedule classes manually to different term sets.

Meeting Patterns

Selected scheduling group/term set:

Available patterns: [Empty List]

Selected patterns: [Empty List]

Navigation buttons: [>], [←], [All >], [← All]

\*Required Save Reset

To see available meeting patterns, click in a row. Do not click a link

When you click the row for a scheduling group, the meeting patterns available to that scheduling group are shown.

- 6 On the Course Offerings page, under Offerings, select the term sets in which the course is offered.

The Offerings panel shows the following information:

Field	Description
Scheduling Group	Shows the scheduling groups defined on the Scheduling Groups page for this active or planning schedule. Click a scheduling group to go to the Scheduling Groups page. For more information, see "Defining Scheduling Groups" on page 171.
Term Set	Shows the scheduling term sets defined on the Term Sets page for this active or planning schedule. Click a term set to go to the Term Sets page. For more information, see "Setting Up Scheduling Term Sets" on page 173.
Default Offering	Shows the default scheduling group and term set to be used by the create classes process. All classes that are automatically created are assigned to this scheduling group, and distributed between the terms of this term set.
Allowed Offering	In addition to the default offering, you can specify other terms available for students to request. For example, if you want to allow students to request one semester of a full year course, you can assign the full year term as the default offering and semesters as another allowed offering. When you enter student course requests, you can specify the full year term for students who want to take the full course, or a single semester for students you want to take part of the course, for example, if they need to switch periods. For more information, see "Allowing Term Overrides for Courses" on page 227.  <b>NOTE</b> Only assign classes to the default offering. Assigning classes to multiple offerings may create grading errors. When you select a Default Offering, this column is automatically selected.
Meeting Patterns	Shows the number of meeting patterns selected for this course. To select meeting patterns for a scheduling group/term set, select its row then, in the Meeting Patterns section, select meeting patterns in the Available Patterns list and move them to the Selected patterns list. Repeat for each scheduling group/term set. The Selected patterns list shows the meeting patterns for the highlighted row. The Meeting Patterns column updates when you click Save or Reset.



- 7 On the Course Offerings page, under Meeting Patterns, select the meeting patterns available for the course and move them to the Selected Patterns list.

Scheduling > Course List > Course Offerings

Actions ▾ Help ▾ | Home | Log off |

English 9 [Copy](#)

Offerings

Scheduling Group	Term Set	Default Offering	Allowed Offering	Meeting Patterns
<a href="#">All</a>	<a href="#">Full Year</a>	<input type="radio"/>	<input checked="" type="checkbox"/>	7
<a href="#">All</a>	<a href="#">Semesters</a>	<input type="radio"/>	<input checked="" type="checkbox"/>	0

Select a default offering to make the course available for scheduling (deselect the default to remove the course from scheduling). This will determine the term set used for classes when they are initially created. Select allowed offerings to allow users to schedule classes manually to different term sets.

Meeting Patterns

Selected scheduling group/term set: All /Full Year

Available patterns:

- Period 8

Selected patterns:

- Period 1
- Period 2
- Period 3
- Period 4
- Period 5
- Period 6
- Period 7

Buttons: →, ←, All →, ← All

\*Required

The course can only be scheduled into meeting patterns that are included in the Selected Patterns list on this page.

- 8 Click Save.

## Copying Course Offerings to Other Courses

When you are setting up courses, you can use the Copy link to copy course information to other courses. Then for the other courses, you only need to change the fields that are different.

### NOTE

You can only copy courses in the planning calendar.

### To copy course offerings to other courses:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 5, click Course Offerings & Meeting Patterns.
- 4 On the Course List page, click the course number of the course you want to copy course offerings from.
- 5 On the Course Offerings page, make sure the course offerings and meeting patterns are set up correctly.

6 Click Copy.

Scheduling Group	Term Set	Default Offering	Allowed Offering	Meeting Patterns
All	Full Year	<input type="radio"/>	<input checked="" type="checkbox"/>	7
All	Semesters	<input type="radio"/>	<input checked="" type="checkbox"/>	0

Select a default offering to make the course available for scheduling (deselect the default to remove the course from scheduling). This will determine the term set used for classes when they are initially created. Select allowed offerings to allow users to schedule classes manually to different term sets.

Selected scheduling group/term set: All /Full Year

Available patterns:  
Period 8

Selected patterns:  
Period 1  
Period 2  
Period 3  
Period 4  
Period 5  
Period 6  
Period 7

\*Required Save Reset

7 On the Copy page, under Fields to Copy, select Course Offerings and Meeting Patterns.

- 8 Under Courses to Copy, search for the course you want to copy the course offerings and meeting pattern to and move them to the Selected Courses List. Click OK.

Scheduling > Course List > Course Offerings > Copy

Actions Help | Home | Log off |

Copy fields from: English 9

Fields to Copy

Selected: 1 Total: 1

- Course fields
- Course offerings and meeting patterns

Courses to Copy to

Basic Detail

Search by:

Course name contains English

- Select a field -

- Select a field -

Display All Records Search

Available Courses:

- English 10
- English 11
- English 12
- Honor English 10

\*Selected Courses:

- Honor English 9

\*Required OK Cancel

## Allowing Term Overrides for Courses

If you want to allow students to be scheduled into single semesters of a full year course, you can set up the course to allow term overrides by assigning additional course offerings. For example, if you want to allow students to request one semester of a full year course, you can assign the full year term as the default offering and semesters as another allowed offering. When you enter student course requests, you can specify the full year term for students who want to take the full course or a single semester for students you want to take part of the course; for example, if they need to switch periods.

For more information about entering course requests, see "Working with Course and Alternate Requests" on page 247.

### NOTE

Only assign classes to the default offering. Assigning classes to multiple offerings may create grading errors.

### To set up a course to allow term overrides:

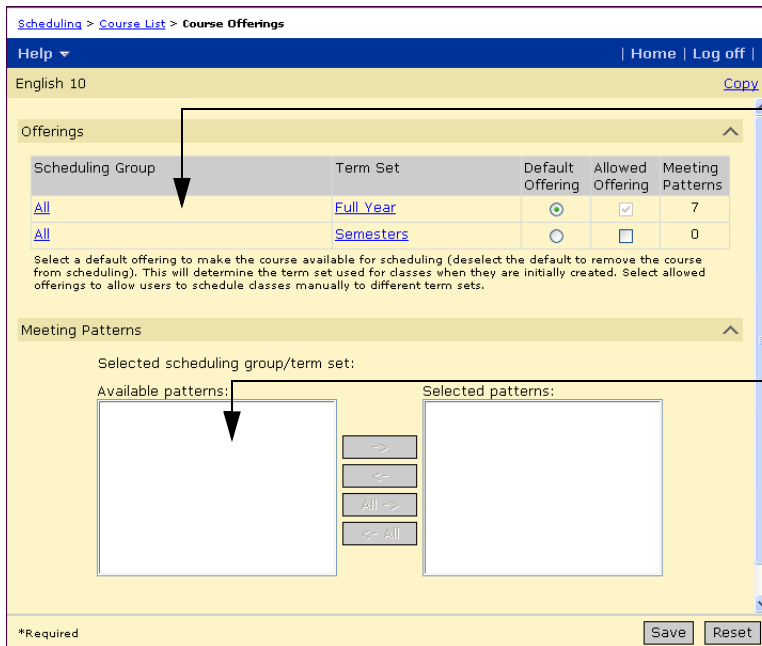
- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.

- 4 If you are using the active calendar, on the Scheduling page, under Step 4, click "Course Offerings & Meeting Patterns".

OR

If you are using a planning calendar, on the Scheduling page, under Step 5, click "Course Offerings & Meeting Patterns".

- 5 On the Course List page, locate and click the course number you want to work with. In the control bar, click Course Offerings.



To see available meeting patterns, click in a row. Do not click a link.

When you click the row for a scheduling group, the meeting patterns available to that scheduling groups are shown.

- 6 On the Course Offerings page, under Meeting Patterns, select the meeting patterns available for the course and move them to the Selected Patterns list.
- 7 On the Course Offerings page, under Offerings, select the default offering for the full year term set. Under Meeting Patterns, move the allowed meeting patterns to the Selected Meeting Patterns list.

- For the Semesters term set, select Allowed Offering. Under Meeting Patterns, move the allowed meeting patterns to the Selected Meeting Patterns list.

Scheduling > Course List > Course Offerings

Actions | Help | Home | Log off

English 9 [Copy](#)

Offerings

Scheduling Group	Term Set	Default Offering	Allowed Offering	Meeting Patterns
<a href="#">All</a>	<a href="#">Full Year</a>	<input type="radio"/>	<input type="checkbox"/>	7
<a href="#">All</a>	<a href="#">Semesters</a>	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	0

Select a default offering to make the course available for scheduling (deselect the default to remove the course from scheduling). This will determine the term set used for classes when they are initially created. Select allowed offerings to allow users to schedule classes manually to different term sets.

Meeting Patterns

Selected scheduling group/term set: All /Full Year

Available patterns:

- Period 8

Selected patterns:

- Period 1
- Period 2
- Period 3
- Period 4
- Period 5
- Period 6
- Period 7

\*Required [Save](#) [Reset](#)

- Click Save.



# Working with Student Search Results

The Student Search Results page offers several short cuts when scheduling multiple students at once. From a list of students, you can select multiple students and quickly assign a homeroom, class, or course requests. You can also quickly open a student's schedule from the Student Search Results page.

## Searching for Student Records

There are several ways to search for students in Chancery SMS:

To	Use this search type
Choose from a Basic or Detail search.	Student Search
View a pre-defined group of students, such as all students in a school or all students in a grade level. You can also search by name or student ID.	Quick Search
Search by additional demographic information, such as Phone, Birthdate, Age, and Grade.	Basic Search
Customize your search criteria by using advanced search parameters.	Detailed Search

At the top of the Quick Search page or at the top of any search results page (Quick, Basic, Detailed, or Saved List):

To	Do this
Search by a student's exact student number	<ul style="list-style-type: none"><li>Enter the number in the "Last Name or ID" field.</li></ul>
Search for students whose last names start with the entered value, such as "Smi"	<ul style="list-style-type: none"><li>Enter the fragment in the "Last Name or ID" field.</li></ul>
Search for students whose first or preferred names start with the entered value, such as "Jen"	<ul style="list-style-type: none"><li>Enter the fragment in the "First or Preferred Name" field.</li></ul>

Using the List dropdown, you can filter your Quick Search, Basic Search, and Detailed Search results to show three types of students:

Student type	Definition
Active	Students who are currently enrolled in a school. They have an entry-type status code at a school, indicating they enrolled either in the past or today, and have not since withdrawn.
Incoming	Students who have an entry-type or re-entry-type status code in the future.
Withdrawn	Students who have a withdrawn-type status code at a school in the past or today, and have not since re-enrolled.

In addition, you can save your search results to Saved Lists for future use.

## Performing a Student Search

The Student Search features a Basic search and a Detail search. Use the Basic search to search by common student demographic fields. Use the Detail search to search by fields within categories, such as Personal or Enrollment.

### NOTE

Any student-related custom data fields added to Chancery SMS are accessible in the Detail search.

### To search for students using the Basic search:

- 1 Log on as a school administrator.
- 2 In the control bar, under Student, click Student Search.
- 3 On the Basic tab, use one of the following search options:

Search Option	Description
Search by	<p>Enter up to three search constraints. Enter a field, an operator, and a value. Choose from common student demographics fields, such as:</p> <ul style="list-style-type: none"> <li>• Age (current)</li> <li>• Birthdate</li> <li>• Ethnic Category</li> <li>• First Name</li> <li>• First or preferred name</li> <li>• Last Name</li> <li>• Gender</li> <li>• Geocode (Active)</li> <li>• Geocode (Planning)</li> <li>• Grade Level (current)</li> <li>• Home School (current)</li> <li>• Normal Program</li> <li>• Phone (numbers only)</li> <li>• Phone (with formatting)</li> <li>• Special Program</li> <li>• Track</li> <li>• Phone</li> <li>• SSN or PIN</li> <li>• Student Number</li> <li>• Student saved lists</li> </ul>
Display all records	<p>Rather than search for specific students, you can display all students.</p> <p><b>NOTE</b> Chancery SMS can display up to 1000 records. If there are more than 1000 records in the search results, you will need to narrow your search criteria.</p>
List	<p>Choose from previously-used search criteria. For example, if you recently searched for students whose first name is Colin, that search criteria is saved to this list.</p>

- 4 Click Search.



**To search for students using the Detail search:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Student, click Student Search.
- 3 On the Detail tab, from the Category dropdown, select a category such as Enrollment, Personal, Scheduling, or Registration.
- 4 Use one of the following search options:

Search Option	Description									
Search by	<ol style="list-style-type: none"> <li>1 Enter your search criteria. Enter a field, an operator, and a value.   <div style="text-align: center;"> <table border="1" style="margin: auto;"> <tr> <td style="text-align: center;">Field</td> <td style="text-align: center;">Operator</td> <td style="text-align: center;">Value</td> </tr> <tr> <td style="text-align: center;">Age (current)</td> <td style="text-align: center;">is</td> <td style="text-align: center;">17</td> </tr> <tr> <td colspan="3" style="text-align: right;"> <input type="button" value="Add Criteria"/> </td> </tr> </table> </div> </li> <li>2 Click Add Criteria. To narrow the search result, add additional criteria.</li> <li>3 Indicate whether to match all criteria or match any criteria.</li> </ol>	Field	Operator	Value	Age (current)	is	17	<input type="button" value="Add Criteria"/>		
Field	Operator	Value								
Age (current)	is	17								
<input type="button" value="Add Criteria"/>										
Display all records	<p>Rather than search for specific students, you can display all students.</p> <p><b>NOTE</b> Chancery SMS can display up to 1000 records. If there are more than 1000 records in the search results, you will need to narrow your search criteria.</p>									
List	Choose from previously-used search criteria. For example, if you recently searched for students whose first name is Colin, that search criteria is saved to this list.									

- 5 Click Search.

**Performing a Quick Search**

Under Quick Search, click a link to view all students, students in a specific grade, recently enrolled students (within the past 30 days), or students withdrawn this year. In addition, use the "Last Name or ID" or the "First or Preferred Name" fields at the top of the Quick Search page to search for a specific student.

**To find a student using a Quick Search:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Student, click Quick.

- 3** On the Quick Search page, in the “Last Name or ID” field or the “First or Preferred Name” field, enter the student’s ID number, last name, or first name, or partial values of any of these.

OR

Do one of the following:

To	Do this
View all students in your school (depending on your access level – office staff typically are set up to access all students)	<ul style="list-style-type: none"> <li>Click All Students.</li> </ul>
View students assigned to your classes (depending on your access level – teachers typically are set up to only access students assigned to classes they teach)	<ul style="list-style-type: none"> <li>Click My Students.</li> </ul>
View all students in a selected grade	<ul style="list-style-type: none"> <li>Click a grade level.</li> </ul>
View one of the following pre-defined searches: <ul style="list-style-type: none"> <li>Recently Enrolled Students</li> <li>Withdrawn Students This Year</li> </ul>	<ul style="list-style-type: none"> <li>In the Pre-Defined Searches panel, click a pre-defined search.</li> </ul>
View a user-defined list of students	<ul style="list-style-type: none"> <li>In the Saved List panel, click a saved list.</li> </ul>
View only active students	<ul style="list-style-type: none"> <li>From the Edit menu, click Hide Incoming Students and Hide Withdrawn Students.</li> </ul>

The Search Results page displays a list of possible matches. If there are many students, you may need to scroll or click the Prev/Next paging controls to find the student you’re looking for.

- 4** To open a student record, click the student’s name.

## Performing a Basic Search

A basic search is a precise way of finding students. For example, if you enter a student’s name and phone number, you’ll narrow your search results.

You don’t have to use all the search fields. Records are found that meet all the criteria you enter while fields you leave blank are ignored. For example, if you enter a last name and a phone number, the results include only students who have both the last name and the phone number you specified.

If you’re not sure of the correct spelling of a student name, enter the first few letters. The results include names beginning with those letters. Use either upper or lower case letters. For example, searching for “lancaster” finds “Lancaster”. Enter spaces exactly. For example, searching for “delos santos” does not find “de los santos”.


**To find a student using a Basic Search:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Student, click Basic.
- 3 On the Basic Search page, enter your search criteria:

Field	Description
Student Name	Search for all students with the same Last Name or all students with the same First or Preferred Name. If you're unsure of the spelling, enter the first two or three letters.
Student ID	Enter a complete Student ID.
Alternate Student #	Enter an alternate number derived from a numbering system that might be set up at your district.
SSN/SIN	Enter the student's Social Security Number or Social Insurance Number.
Phone	Enter the student's home phone number.
Current grade	Select a specific grade level.
Geocode (Active)	Enter the student's geographical region code for the current year.
Geocode (Planning)	Enter the student's geographical region code for the coming year.
Birthdate	Enter a birthdate in mm/dd/yyyy format.
Age/as of	Enter a specific age and the date at which the age was calculated.

**NOTE**

Depending on your access privileges, some options might not be available.

- 4 Click Search to display your search results.  
The Search Results page displays a list of possible matches. If there are many students, you can scroll or click the Prev/Next paging controls to find the student you're looking for.  
If you're not satisfied with your search results, click  to open the Search Criteria panel, modify your search criteria then click Search.
- 5 To view only active students, from the Edit menu, select Hide Incoming Students and Hide Withdrawn Students.
- 6 To open a student record, click the student's name.

**Performing a Detailed Search**

A detailed search is a good way to find a range of students who match a variety of criteria that you set.

In a detailed search, each of the criteria has three parts:

- a field name
- an operator
- a value

The following criteria finds students whose last name begins with "Sm" and would find Smith, Smythe, Small, and so on:

- Field Name = Last Name
- Operator = Starts with
- Value = Sm

The screenshot shows a search criteria form with a yellow background. At the top, there is a 'Category' dropdown menu set to 'Most Frequent'. Below it, three arrows point to the 'Field name', 'Operator', and 'Value' fields. The 'Field name' is 'Last name', the 'Operator' is 'starts with', and the 'Value' is 'Sm'. An 'Add Criteria' button is located below these fields. Below the form, there is a 'Search Criteria' section with a 'Match:' section containing two radio buttons: 'All criteria' (selected) and 'Any criteria'. Below this, a list of search criteria is shown, with 'Last name starts with "Sm"' selected. At the bottom, there are 'Search' and 'Remove' buttons.

Add the following criteria to find Grade 5 students AND whose last name begins with Sm:

- Field Name = Grade Level (current)
- Operator = Is
- Value = 5

To reduce the number of students who match, add a criteria and select "All criteria".

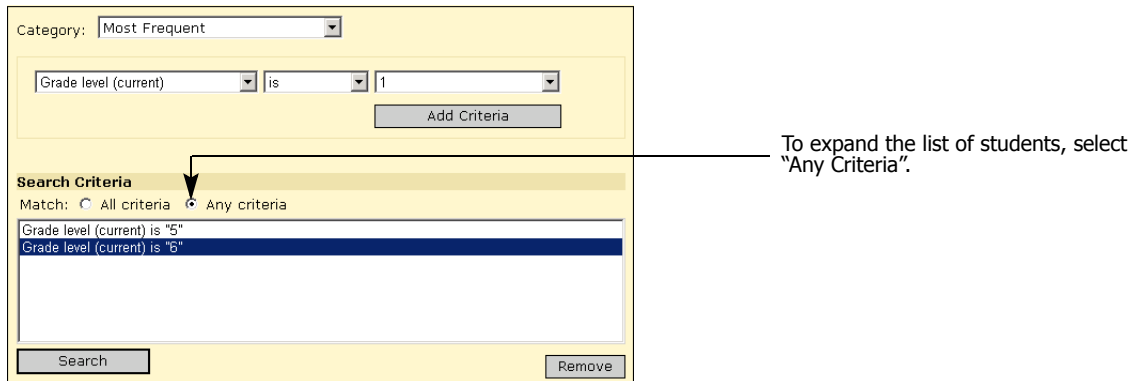
The screenshot shows the same search criteria form as above, but with an additional criterion added. The 'Field name' is 'Grade level (current)', the 'Operator' is 'is', and the 'Value' is '5'. The 'Match:' section now has 'All criteria' selected. The list of search criteria now includes 'Last name starts with "Sm"' and 'Grade level (current) is "5"'. The 'Search' and 'Remove' buttons are still present at the bottom.

To narrow the list of students, select "All Criteria".

The following criteria finds all the students who are in Grade 5 OR Grade 6:

- Field Name = Grade Level (current)
- Operator = Is
- Value = 5; repeat for Value = 6

By searching for any criteria, you increase the number of students who match the criteria.



**To perform a Detailed Search:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Student, click Detailed.
- 3 From the Category dropdown, select the type of data you want to search for. Choose from:
  - Most Frequent
  - Personal
  - Tennessee (only Tennessee customers see this option)
  - Student Contacts
  - Registration
  - Enrollment
  - Scheduling

**NOTE**

If custom pages have been added to Chancery SMS using cTools (previously known as Custom Data Management [Student Pages]), you can also select the names of the basic tables, multi-select lists, chronological groups, and repeating groups.

- 4 From the left dropdown, select a field name.
- 5 From the middle dropdown, select an operator:

To find records where the field	Use this operator
Includes the value anywhere in the field	Contains
Ends with the value	Ends with
Exactly matches the value	Is
Is anything but the value	Is not
Starts with the value	Starts with
Is greater than the value	Greater than
Is less than the value	Less than
Is greater than or equal to the value	> or =

To find records where the field	Use this operator
Is less than or equal to the value	< or =

- 6** In the right field, enter or select a value from the dropdown.

Enter either upper or lowercase letters. For example, searching for "lancaster" finds "Lancaster". Enter spaces exactly. For example, "delos santos" does not find "de los santos".

**NOTE**

To include all students in your search results, select the "Last Name" or "First or Preferred Name" fields from the left dropdown, select Starts With from the middle dropdown then enter "%" as the value in the right dropdown.

- 7** Click Add Criteria.
- 8** To add more criteria to your search, repeat steps 4 through 7.
- 9** Select whether you want your search to match All Criteria or Any Criteria.


**NOTE**

If you select All Criteria, only records that match every criteria you have added appear. If you select Any Criteria, records that match any of the criteria you have added appear.

To remove criteria from the search, highlight the statement and click Remove.

- 10** Click Search.

The Search Results page displays a list of possible matches. If there are many students, you can scroll or click the Prev/Next paging controls to find the student you're looking for.

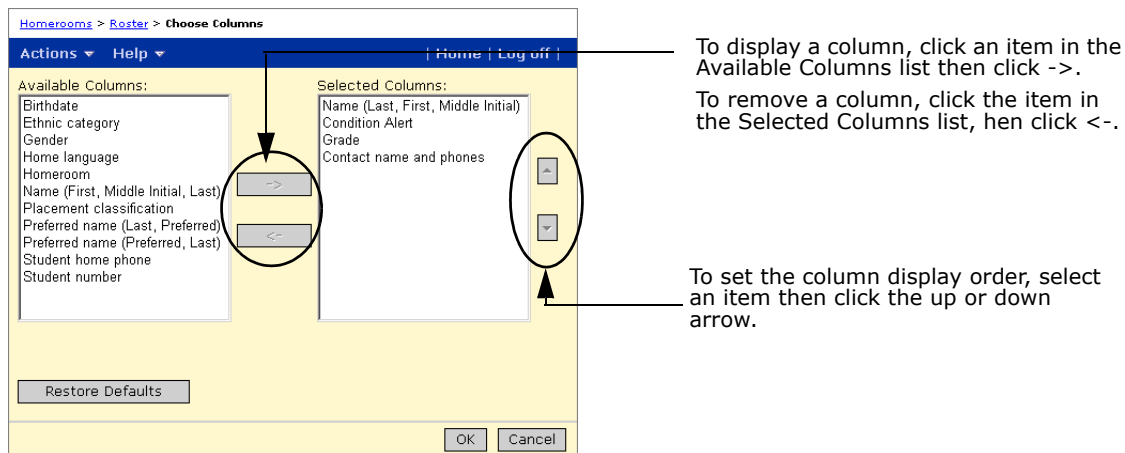
If you're not satisfied with your search results, click  to open the Search Criteria panel, modify your search criteria then click Search.

- 11** To view only active students, from the Edit menu, select Hide Incoming Students and Hide Withdrawn Students.
- 12** To open a student record, click the student's name.

## Customizing How Student Search Results Display

You can customize the columns that display on the Student Search Results page to suit your needs.

- 1 On any Student Search Results page, from the Edit menu, click Choose Columns.
- 2 On the Choose Columns page, select the columns that best help you with your current task.



For example, if you are compiling a list of students whose parents need to be contacted, you might select the following columns:

- Name
- Grade
- Homeroom
- Gender
- Student phone number

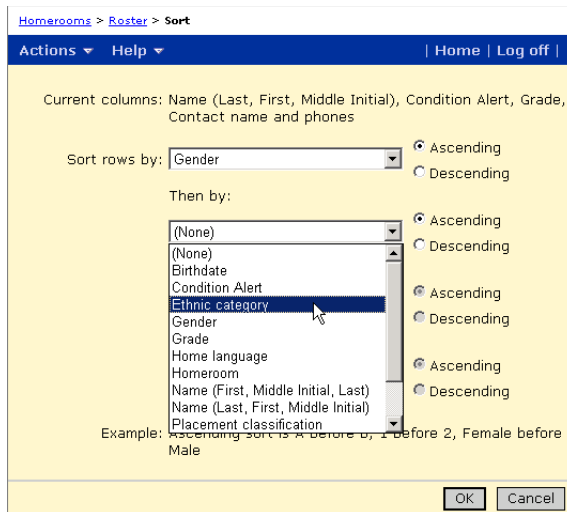
To set the column display order, select an item then click the up or down arrow.

- 3 To return to the Student Search Results page, click OK.
- 4 On the Student Search Results page, from the Edit menu, click Sort.

- On the Sort page, indicate the sort order. For example, you might want to sort the list of students in ascending order by Grade then by Homeroom.

**NOTE**

You can sort data by columns that are not visible on the screen. For example, you might not want to see the Gender column, but you can still sort by that column.



- Click OK.

## Saving Your Search Results

In addition to the pre-defined searches available in Chancery SMS, you can also save your custom search results to a saved list for future use. For example, save a list of students who require a specific resource service.

A saved list is a static list of students that you update as needed. For example, when more students require the resource service, the additional students are not included in the saved list until you manually update the saved list to include those students. However, any changes you make to a student’s demographic data are updated to the saved list, in real time. For example, when you update a student’s grade level, all saved lists that contain that student are updated accordingly.

**To save your search results to a list:**

- On any Student Search Results page, select the students you want to save to a list.
- From the Actions menu, click Save to List.
- On the Save to List page, select Create New List, and enter an appropriate list name and description.

OR

If you want to replace the names in an existing saved list, select Add to Existing List, and then select a list from the List Name dropdown.



**NOTE**

To append students to an existing saved list, edit the saved list.

To add the students to a new saved list, select Create New List.

To replace an existing list with the selected students, select Add to Existing List.

**4** Click OK.

**To create or edit a Saved List:**

**1** On the Quick Search page, in the Saved Lists area, click Edit.

To edit an existing saved list, on the Quick Search page, click Edit.

**2** To create a new saved list, from the Actions menu, click Add Saved List.

OR

To edit an existing saved list, on the Saved List page, click the list name you want to edit.

**3** Enter or change the List Name and Description.

**4** Enter your search criteria in the Last Name and First Name fields and click Search.

- 5 Identify the list members. Select a student from the Search Results list and click Add.
- OR

Select a student from the List Members list and click Remove.

- 6 Click OK.

### To delete a Saved List:

- 1 On the Quick Search page, under Saved Lists, click Edit.
- 2 On the Saved List page, select the saved list you want to delete. From the Actions menu, click Delete Saved List.
- 3 Click OK.

## Changing Class Assignments for Multiple Students

From a Student Search Results page, you can quickly add or drop classes for multiple students.

### NOTE

If the class assignment changes result in any class exceeding their defined capacity, you must have the Classes - Exceed Capacity permission set to “Yes” to make the changes.

### To change class assignments for multiple students:

- 1 Log on as a school administrator.
- 2 Perform a basic, quick, or detailed search.  
For information about searching for student records, see “Searching for Student Records” on page 231.
- 3 On the Student Search Results page, select the students you want to assign or drop classes for.
- 4 From the Actions menu, click Assign > Classes.
- 5 If you are working in the active calendar, in Effective Date, select the date you want the change to take effect.

- 6 If you are working in the active calendar and Change Reasons are set up by your district, from the Change Reason dropdown, select the reason the student’s schedule is being changed.

The selected Change Reason applies to all adds, drops, or transfers in the Classes to Add/Drop panel when you click Apply.

- 7 On the Assign Classes page, search for the classes you want to change.
- 8 In the class search results, select classes and do one of the following:

To	Do this
Add a class to the students’ schedules	<ul style="list-style-type: none"> <li>• Click Add Class.</li> </ul>
Remove a class from the students’ schedules	<ul style="list-style-type: none"> <li>• Click Remove Class.</li> </ul>
Transfer from one class into a different class	<ol style="list-style-type: none"> <li>1 Select a class to add. Click Add Class.</li> <li>2 Select a class to drop. Click Drop Class.</li> <li>3 Select Transfer.</li> </ol>

When you add or remove classes, the selected classes are added to the Add Classes or Drop Classes lists.

The screenshot shows the 'Assign Classes' interface. At the top, there is a breadcrumb trail: 'Quick Search > Student Search Results > Assign Classes'. Below this is a navigation bar with 'Help' and 'Home | Log off'. The main area is titled 'Assign Classes' and shows a table of selected classes. The table has columns for 'Status', 'Term', 'Meeting Pattern', 'Class Name', and 'Room'. Two rows are shown, both for 'CRD-Chemistry-2S-1' in 'Room3 (M1)'. Below the table are 'Add Class' and 'Drop Class' buttons. To the right, there is a 'Changes effective:' dropdown set to '1<sup>st</sup> Day in School' and a '\*Change Reason:' dropdown set to 'Conflict'. Below this is a section titled 'Classes to add/drop for selected students'. It contains two lists: 'Add Classes:' with one entry 'CRD-Chemistry-2S-1 (Term: S1, Meets: MP1, Room: Room3 (M1))' and 'Drop Classes:' with one entry 'CRD-Chemistry-2S-1 (Term: S2, Meets: MP1, Room: Room3 (M1))'. Each list has a 'Remove from list' button. At the bottom, there is a 'Transfer' checkbox with the text '(requires 1 class to add and 1 to drop)'. At the very bottom are 'Apply', 'OK', and 'Cancel' buttons. Three arrows point from text annotations to the 'Change Reason' dropdown, the 'Remove from list' buttons, and the 'Transfer' checkbox.

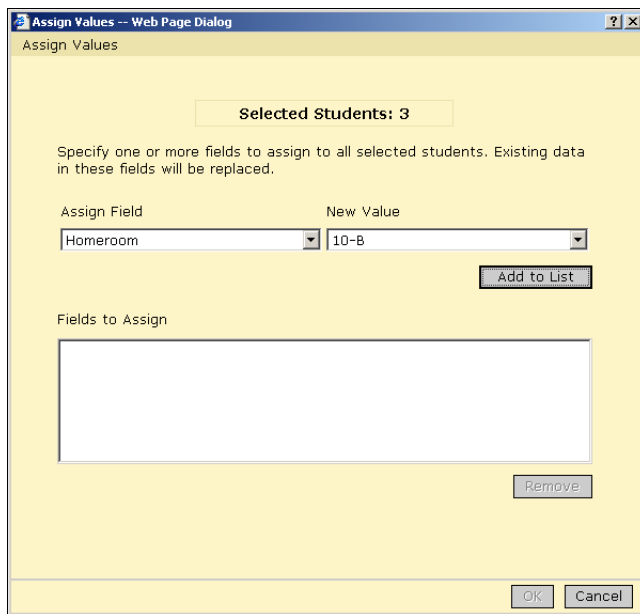
- 9 Click Apply.

## Assigning Homerooms to Multiple Students

From a Student Search Results page, you can quickly assign or change the homeroom for multiple students. You can assign homerooms by assigning a homeroom value, or you can transfer students from one homeroom to another.

### To assign a homeroom:

- 1 Log on as a school administrator.
- 2 Perform a basic, quick, or detailed search.  
For information about searching for student records, see "Searching for Student Records" on page 231.
- 3 On the Student Search Results page, select the students you want to assign a homeroom.
- 4 From the Action menu, click Assign Values.
- 5 On the Assign Values page, from the Assign Field dropdown, select "Homeroom". From the New Value dropdown, select the homeroom you want to assign to the selected students. Click Add to List. Click OK.



- 6 Click OK.
- 7 If you are working in the active calendar, in the Change Options dialog, specify when you want this change to take effect and, if required, select the reason the students' homeroom is being changed. Click OK.

### To transfer student homerooms:

- 1 Log on as a school administrator.
- 2 Perform a basic, quick, or detailed search.  
For more information, see "Searching for Student Records" on page 231.
- 3 On the Student Search Results page, select the students you want to transfer to a different homeroom.

- 4 From the Actions menu, click Transfer Homerooms.
- 5 On the Transfer Homeroom page, select the homeroom you want to assign to the selected students.
- 6 If you are working in the active calendar, in the Change Options dialog, specify when you want this change to take effect and, if required, select the reason the students' homeroom is being changed. Click OK



# Working with Course and Alternate Requests

Course requests indicate which courses students would like to take. Automatic scheduling processes, such as the Student Loader and the Walk-in Scheduler, attempt to schedule students into classes based on their course requests and the system-wide student loader options. If the scheduler cannot find a suitable class for the student, it will not schedule the student into the requested course.

When you assign course requests, you can specify the priority for each request to ensure that a lower priority course is not scheduled before a higher-priority course. You can also enter alternate requests. If the scheduler is not able to schedule the student into all of their requested courses, it will attempt to schedule them into alternates.

Entering alternate requests for requested courses allows automatic scheduling processes more flexibility for generating student schedules and increases the likelihood that the scheduler can create a full schedule for students. If you want to make early runs of the Student Loader without using alternates, you can still enter alternates for students and then set the Student Loader user Alternates option to "No". To get more flexibility to schedule the more difficult-to-schedule students in later runs, change this option to "Yes". For more information about setting Student Loader options, see "Setting Student Loader Options" on page 307.

You can assign course and alternate requests to individual students or to multiple students at one time. If you want to assign the same course requests already assigned to another student, you can copy the course requests from one student to another. You can also create saved lists of students and courses to help you quickly assign course requests.

## NOTE

Copying course requests from one student to another also copies the course request settings for priority, term, and required/elective status. If a new student requires the same courses with the same settings, you can save time re-entering the course request settings by copying course requests.

## Entering Course and Alternate Requests for Individual Students

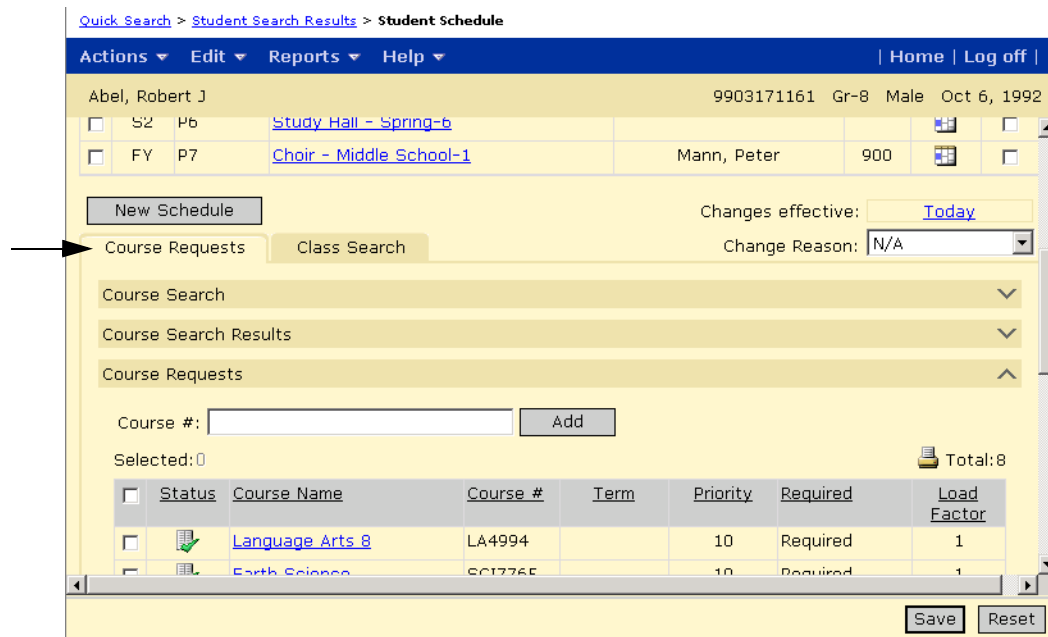
For each student, you can enter courses the student would like to take. When schedules are created using the Walk-in Scheduler, Chancery SMS attempts to assign a class for all course requests entered for the student. If it is unable to schedule a class for a course, Chancery SMS could assign an alternate class if an alternate request is entered for the student.

### Assigning Course Requests

- 1 Log on as a school administrator.
- 2 Open the student's schedule.

For more information, see "Opening Student Schedules" on page 321.

**3** On the Student Schedule page, click the Course Request tab.



**4** Do one of the following:

To	Do this
Add course requests by searching for courses	<ol style="list-style-type: none"> <li>1 Expand the Course Search Panel.</li> <li>2 Search for and select the requested course for the student.</li> <li>3 Click Add Request.</li> </ol> <p><b>NOTE</b> You can create a saved list of courses and then search for the saved list. For more information, see “Using Saved Lists to Assign Course Requests” on page 259.</p>
Add course requests by number	<ol style="list-style-type: none"> <li>1 In Course #, enter the course number for the requested course. You can enter multiple course numbers separated by commas.</li> <li>2 Beside Course #, click Add.</li> </ol> <p><b>NOTE</b> You can use Notepad to save a list of frequently requested course numbers and then copy and paste them into this field. For more information, see “Using Notepad to Enter Student Course Requests” on page 251.</p>



- In the Requests list, select the course request and enter the following information, as required.

Field	Description
Term	<p>Select the term this course can be used.</p> <p>The options include terms specified as offerings for this course. For more information about setting course offerings, see "Configuring Terms and Meeting Patterns for Courses" on page 223.</p> <p>None indicates the course can be scheduled in any available term.</p> <p>[P] indicates the term is preferred but another term is acceptable.</p> <p>[O] indicates the course can be scheduled in the selected term only.</p> <p><b>NOTE</b> To allow students to request one semester of a full year course, you must set up the course to allow term overrides. For more information, see "Allowing Term Overrides for Courses" on page 227.</p>
Priority	<p>The priority determines which alternate course the Student Loader tries to schedule first when a request cannot be scheduled.</p> <p>Enter a priority from 1 (highest) to 9999 (lowest). The default priority is 10 so you can give some courses a higher priority without having to change all the others. A blank priority is the same as 9999.</p> <p>Courses with the same priority are selected randomly.</p>
Required	<p>Specify whether the course is required or an elective.</p> <p>The default value is set at the district. You can override the default for different students.</p> <p>Required courses have higher priority than electives and are scheduled first.</p> <p>The priority is applied to required courses and electives separately.</p>

Course Requests

Course #:  Add

Selected: 1 Total: 1

<input checked="" type="checkbox"/>	Status	Course Name	Course #	Term	Priority	Required	Load Factor
<input checked="" type="checkbox"/>		MA - English Lit	MA1111	None	10	Required	1

Requested scheduling load: Required: 1.00 Elective: 0.00

- Click Save.

## Assigning Alternate Requests

If you do not want automated scheduling processes to use alternate requests when initially scheduling students, you can assign the alternates and set the student loader options to not use alternates. Then when you are ready to schedule student alternate courses, you can set the options to use alternates. For more information, see “Setting Student Loader Options” on page 307.

### To assign alternate requests to students:

- 1 Log on as a school administrator.
- 2 Open the student’s schedule.
- 3 On the Student Schedule page, click the Course Request tab.
- 4 Do one of the following:

To	Do this
Add alternate course requests by searching for courses	<ol style="list-style-type: none"> <li>1 Expand the Course Search Panel.</li> <li>2 Search for and select the requested alternate courses for the student.</li> <li>3 Click Add Alternate.</li> </ol> <p><b>NOTE</b> You can create a saved list of courses and then search for the saved list. For more information, see “Using Saved Lists to Assign Course Requests” on page 259.</p>
Add an alternate course request by number	<ol style="list-style-type: none"> <li>1 In Alternate Course #, enter the course number for the alternate request. You can enter multiple course numbers separated by commas.</li> <li>2 Beside Alternate Course #, click Add.</li> </ol> <p><b>NOTE</b> You can use Notepad to save a list of frequently requested alternate course numbers and then copy and paste them into this field. For more information, see “Using Notepad to Enter Student Course Requests” on page 251.</p>

- In the Alternates list, select the alternate and enter the following information, as required.

Field	Description
Term	Select the term this alternate can be used. The options include terms specified as offerings for this course. For more information about setting course offerings, see "Configuring Terms and Meeting Patterns for Courses" on page 223. None indicates the alternate could be used in any available term. [P] indicates the term is preferred but another term is acceptable. [O] indicates the alternate can be scheduled in the selected term only.
Priority	The priority also determines which alternate course the Student Loader tries to schedule first when a request cannot be scheduled. Enter a priority from 1 (highest) to 9999 (lowest). The default priority is 10 so you can give some courses a higher priority without having to change all the others. A blank priority is the same as 9999. Courses with the same priority are selected randomly.
Alternate For	Specify which requested courses this course can be used as an alternate. You can select Any Required or Any Elective or specify a specific course that is included in the student's course requests. Generally, it is better to assign alternates as replacements for specific requests. If a specific course is selected, this alternate is only used if that course cannot be scheduled.

Alternate course #:

Selected: 1 Total: 1

<input checked="" type="checkbox"/>	Status	Course Name	Course #	Term	Priority	Load Factor	Alternate For
<input checked="" type="checkbox"/>		MA - Algebra	MA1112	None	10	1	Any Required

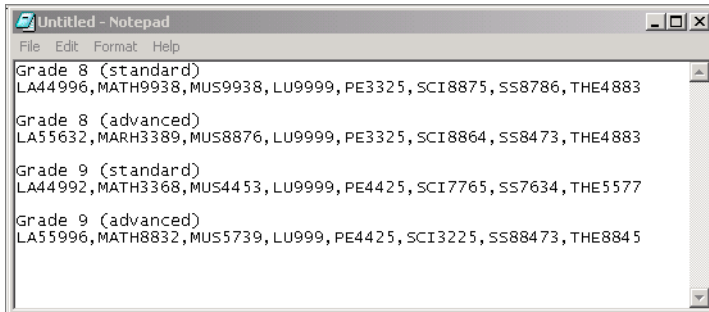
- Click Save.

## Using Notepad to Enter Student Course Requests

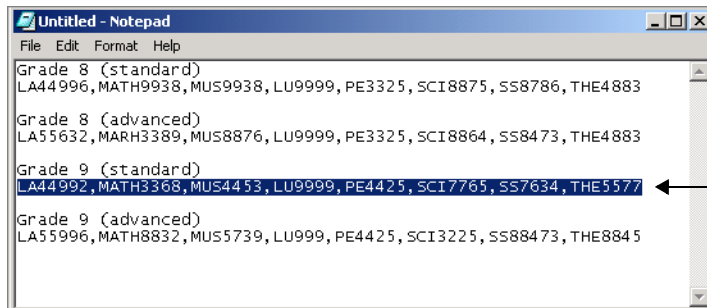
If specific groups of students generally request the same courses, you can use Microsoft Notepad to more efficiently enter student course requests. To do this, create a Notepad file and enter comma-delimited lists of the course numbers frequently requested by specific groups of students; for example, you might create a list of courses for students in the Grade 8 standard stream and another list for Grade 8 students in the advanced stream, and so on.

**To use a Notepad file to enter student course requests:**

- 1 Open a Microsoft Notepad file.
- 2 In Notepad, enter a comma-delimited list of courses for each group of students that have similar requests. Click File > Save and save the file to your desktop or other easy-to-find location.



- 3 With the Notepad file open on your desktop, open Chancery SMS.
- 4 Log on as a school administrator.
- 5 Open a student schedule.
- 6 On the Student Schedule page, click the Course Request tab.
- 7 Press Alt+Tab to switch to the Notepad program.
- 8 Select the course list applicable to the student. Press Ctrl-C to copy the course list.



Select the courses you want to assign and press Ctrl-c to copy the list.

- 9 Press Alt+Tab to switch to Chancery SMS.

- 10 Click the Course # field. Press Ctrl-V to paste the course list into the field.

The screenshot shows a web application interface for a student's schedule. At the top, there's a navigation bar with 'Quick Search > Student Search Results > Student Schedule'. Below that, a student's name 'Brogan, Josefina' is displayed along with their ID '10210498', grade 'Gr-9', gender 'Female', and birth date 'Oct 7, 1990'. There are tabs for 'Course Requests' and 'Class Search'. The 'Course Search' section has a search form with three rows: 'Course name' with 'contains', 'Course grade level' with 'equals', and 'Course saved lists' with 'equals'. A 'Search' button is at the bottom right of the search form. Below the search form is a 'Course Search Results' section with a dropdown arrow. Underneath, there's a 'Course Requests' section with a dropdown arrow. A text input field labeled 'Course #' contains the text 'PE4425,SCI7765,SS7634,THE5577' and an 'Add' button. At the bottom, there are 'Save' and 'Reset' buttons. An arrow from the right points to the 'Course #' field with the text 'Press Ctrl-v to paste the copied course list into the Course # field.'

- 11 Click Add.
- 12 Click Save.

## Deleting Course and Alternate Requests for Individual Students

- 1 Log on as a school administrator.
- 2 Open the student's schedule.
- 3 In the Course Requests panel, select the course requests or alternate requests you want to remove.
- 4 From the Actions menu, click Delete Course Request or Delete Alternate Request.

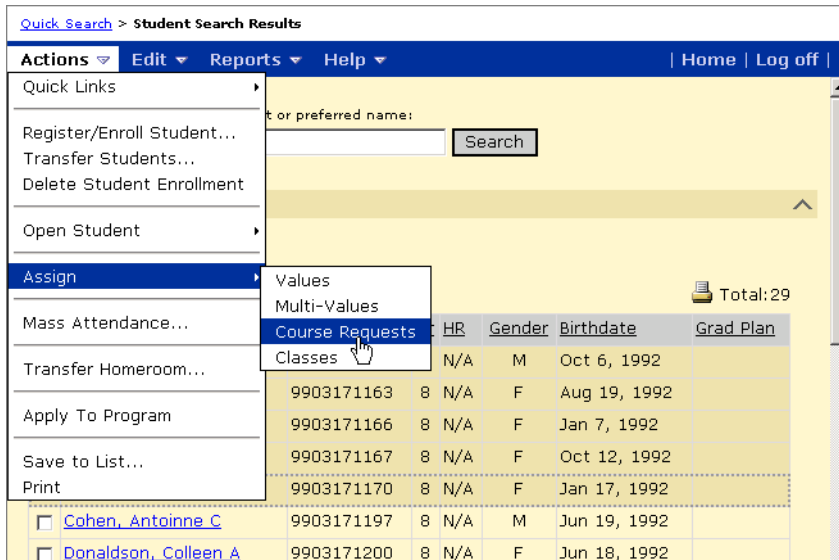
## Entering Course and Alternate Requests for Multiple Students

If you need to assign the same course and alternate requests to multiple students, you can assign course requests from any Student Search Results page.

### To change course requests for multiple students:

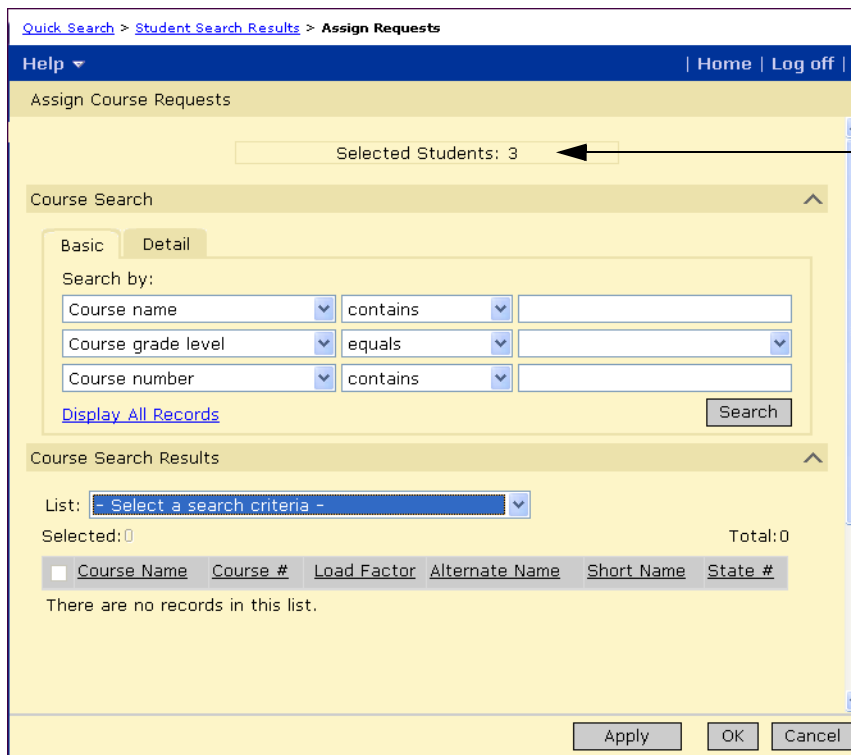
- 1 Log on as a school administrator.
- 2 Search for a student.
- 3 On the Student Search Results page, select the students you want to assign the course requests.

4 From the Actions menu, click Assign > Course Requests.



5 On the Assign Requests page, search for the courses you want to assign as requests to the selected students.

If you created a saved list of courses, you can open the saved list by selecting Course Saved Lists in the first dropdown and the name of the saved list in the third dropdown. For more information, see “Using Saved Lists to Assign Course Requests” on page 259.

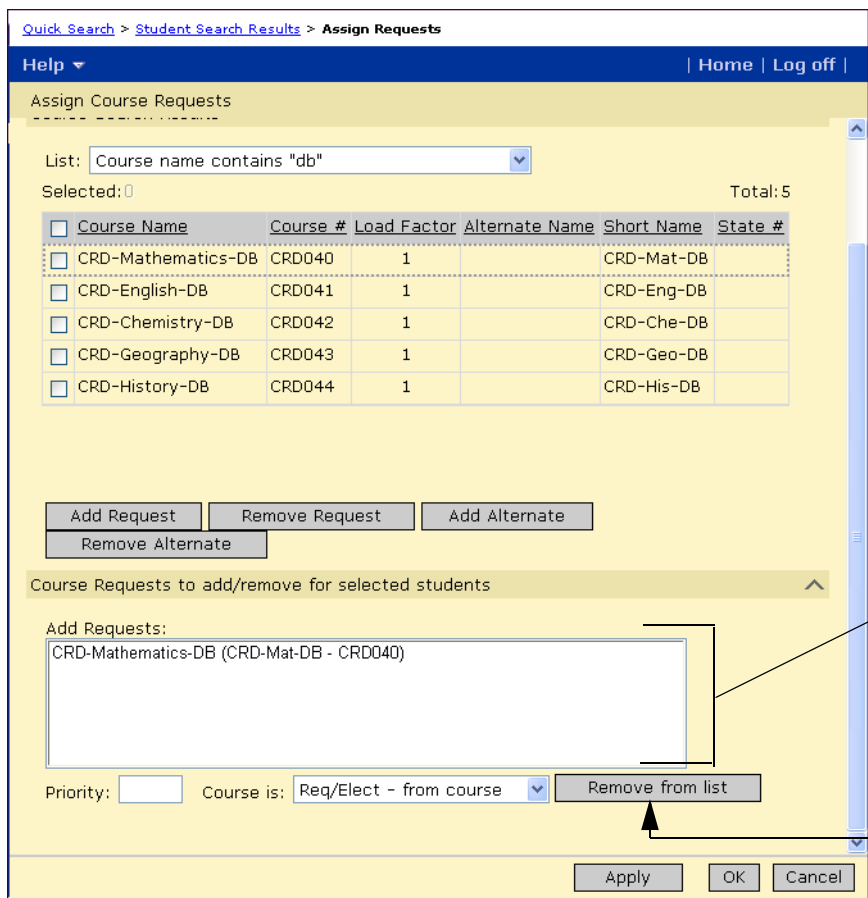


Shows the number of students selected.

**6** From the course search results, select courses and do one of the following:

To	Do this
Add a course request to the students' schedules	<ul style="list-style-type: none"> <li>Click Add Request.</li> </ul>
Remove a course request from the students' schedules	<ul style="list-style-type: none"> <li>Click Remove Request.</li> </ul>
Add an alternate request to the students' schedules	<ul style="list-style-type: none"> <li>Click Add Alternate.</li> </ul>
Remove an alternate request from the students' schedules	<ul style="list-style-type: none"> <li>Click Remove Alternate.</li> </ul>

Added or removed courses are shown in the Add Requests, Remove Requests, Add Alternates, and Remove Alternates lists.



Shows courses that have been added as requests. Scroll down to see courses removed as requests, or added or removed as alternates.

To remove a course from the selected list, select the course in the list and click Remove from List.

- 7** In the Priority field, specify the level of importance that the course be scheduled for the students. If you are adding more than one request or alternate, the selected priority applies to all the courses in the lists.

Enter a priority from 1 (highest) to 999 (lowest). When scheduling students, automated processes select courses with the same priority randomly. The priority is applied to required courses and electives separately, that is, you can have one set of priorities for required courses and another set for electives. The priority also determines which alternate course the Student Loader tries to load first.

- 8** From the Course Is dropdown, select whether the course is required or an elective. If you are adding more than one request or alternate, this value applies to all the courses in the lists.

“Req/Elec - From Course” indicates that the value specified for the course in the course catalog should be used.

- 9** To assign other course requests and alternates, repeat steps 4 to 8.

- 10** Click Apply.

The selected course requests and alternates are applied to all the selected students.

## Copying Course Requests from One Student to Another

If a student is already assigned the course requests you want to assign to a new student, you can copy the course requests from the existing student’s Student Schedule page. When you copy course requests from one student to another, the following course request settings are also copied:

- required/elective status
- priority
- term and whether the requested term is a preference or required

### NOTE

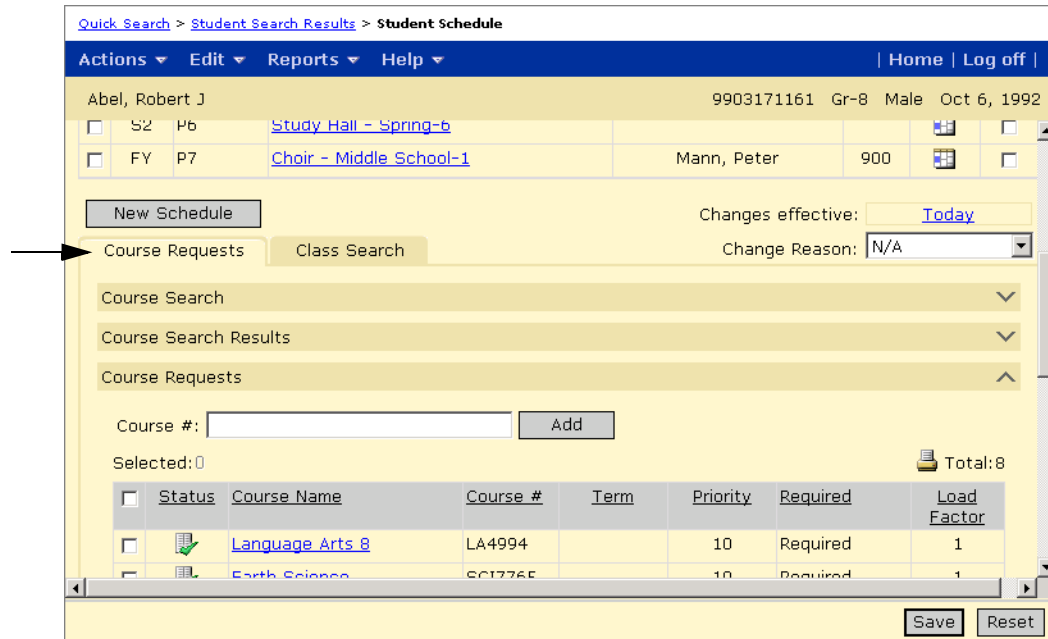
You cannot copy alternate requests.

### To copy course requests from one student to another:

- 1** Log on as a school administrator.
- 2** Open the student schedule for the existing student.

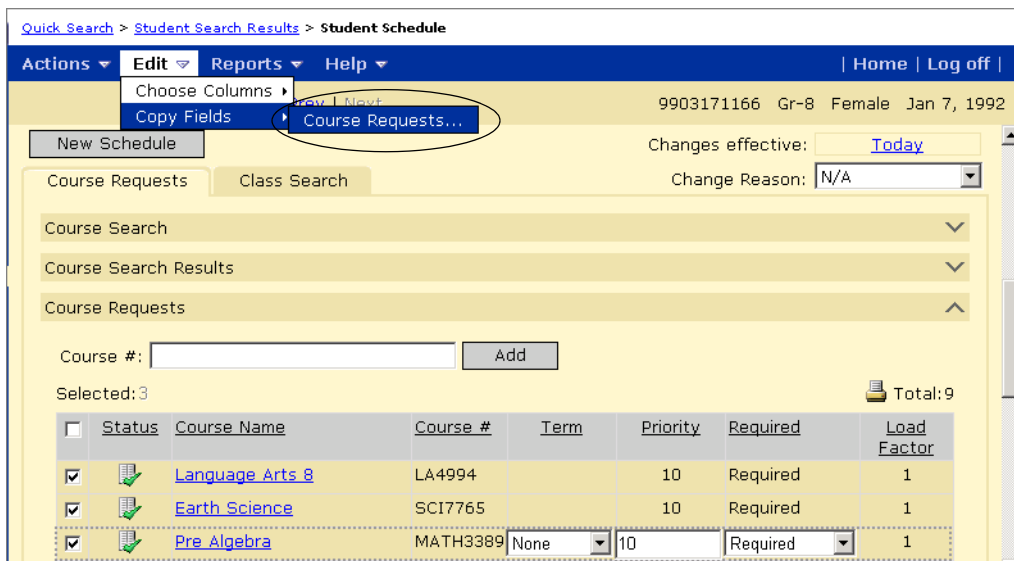


**3** Click the Course Requests tab.

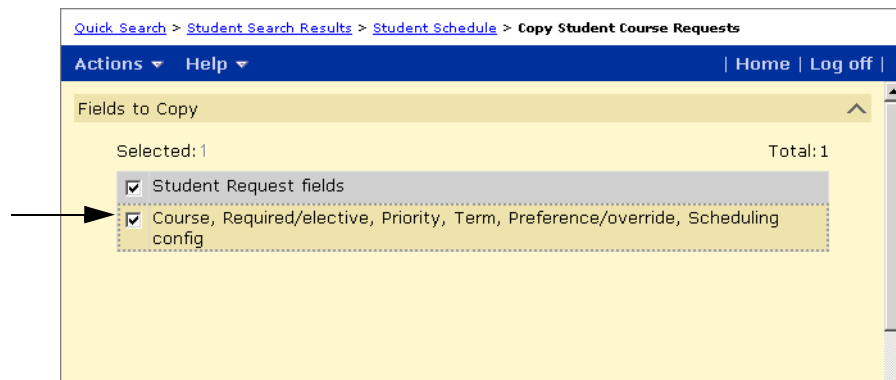


**4** On the Course Requests panel, select the course requests you want to copy to the new student.

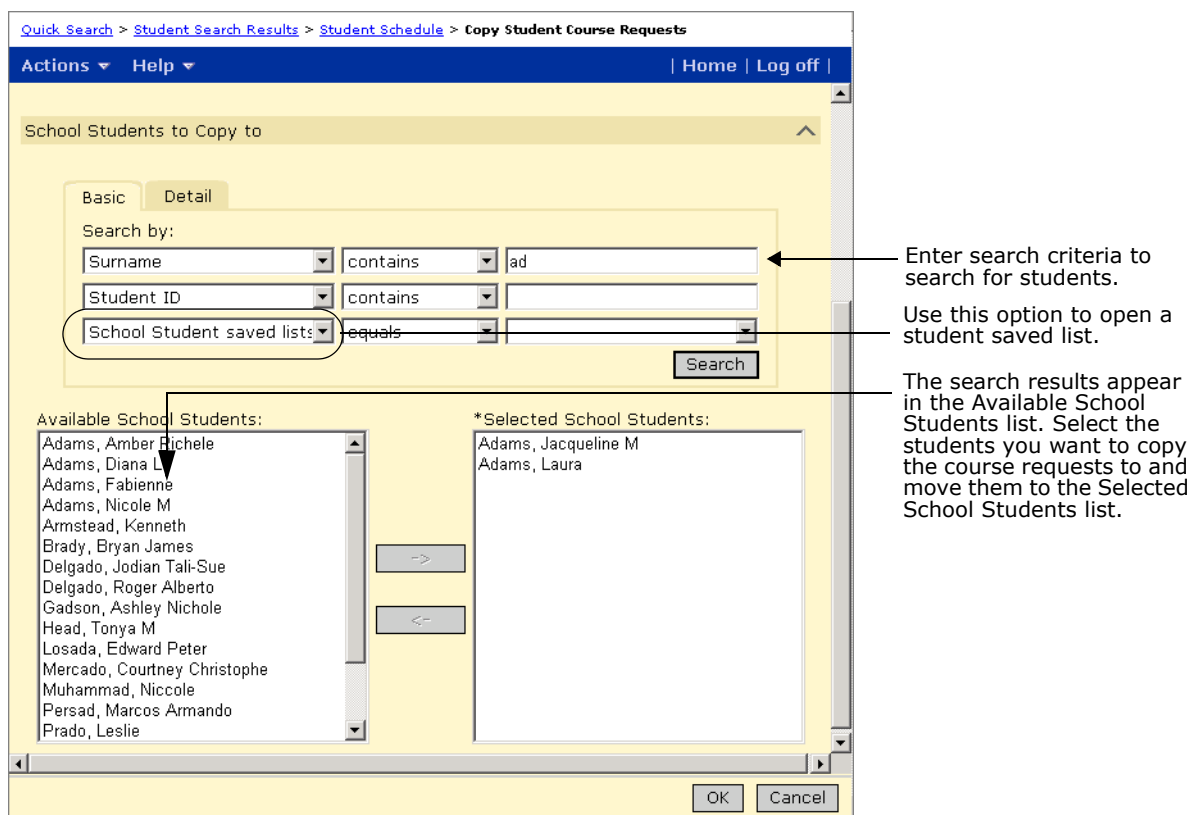
**5** From the Edit menu, click Copy Fields > Course Requests.



- On the Copy Student Course Requests page, under Fields to Copy, select "Course, Required/elective, Priority, Term, Preference/override, Scheduling config".



- Under "School Students to Copy To", search for and select the students you want to copy the course requests to and move them to the Selected School Students list.



- Click OK.

## Using Saved Lists to Assign Course Requests

If you want to assign the same course requests to multiple students, you can also create saved lists of courses and then assign course requests for those courses to selected students. You can even assign the course requests to a saved list of students.

### Creating a Saved List of Courses

- 1 Log on as a school administrator.
- 2 In the control bar, click Scheduling. On the Scheduling page, under Step 1, click Course Setup.  
OR  
In the control bar, click School Setup. On the School Setup page, under School, click Courses.
- 3 On the Course List page, search for and select the courses you want to add to the saved lists.
- 4 From the Actions menu, click Save to List.
- 5 To save the courses to a new list, select Create New List and enter a name and description for the list.  
OR  
To add the courses to an existing list, select Add to Existing List and select the list name.

- 6 Click OK.

## Creating a Saved List of Students

- 1 Search for students.
- 2 From the Student Search Results, select the students you want to add to the saved list.
- 3 From the Actions menu, click Save to List.
- 4 To add the students to a new list, select Create New List and enter a name and description for the list.

OR

To add the students to an existing list, select Add to Existing List.

Quick Search > Student Search Results > Save To List

Help | Home | Log off |

**3 students selected**

Create New List

\*List name:

Description:

Add to Existing List

List name:

To access a saved list, go to the Student Search page.

\*Required

- 5 Click OK.

## Assigning Course Requests for a Saved List of Courses

Once you create a saved list of courses, you can retrieve the course saved list from any Course Search page and then assign those courses as you would any course. When you retrieve a course saved list, you can work with the individual courses in the list; for example, you do not need to assign all the courses in the list as requests for one student.

The following procedure illustrates how you might use a course saved list along with a student saved list to assign course requests to specific students.

**To assign courses from a saved list as requests to students in a saved list:**

- 1 Log on as a school administrator.
- 2 Search for the students you want to assign the course requests to.

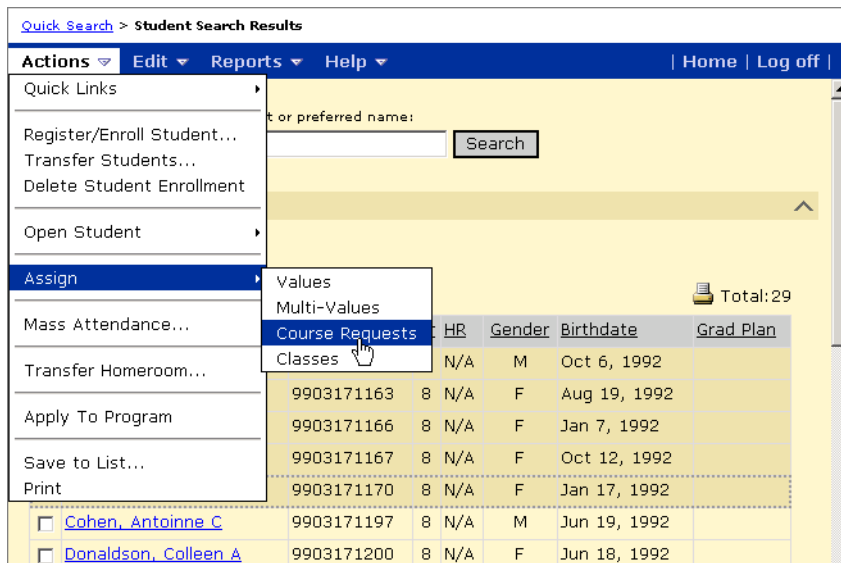
To open a student saved list, in the control bar, click Student Search. In the first Search By dropdown, select School Student Saved List, and, in the third Search By dropdown, select the name of the saved list. Click Search.

The screenshot shows the 'Student Search' interface. At the top, there are navigation links: 'Actions', 'Edit', 'Reports', 'Home', and 'Log off'. Below this is a 'Student Search' section with two tabs: 'Basic' and 'Detail'. The 'Basic' tab is active. Under 'Search by:', there are three dropdown menus. The first is set to 'School Student saved list:', the second to 'equals', and the third to 'NewStudents'. Below these are two more dropdown menus, the first set to 'Student number' and the second to 'contains'. A 'Search' button is located to the right of the second dropdown. Below the search criteria is a 'List:' dropdown menu set to 'School Student saved lists equals "NewStudents"'. A 'Display All Records' link is also present. The 'Search Results' section shows 'Selected: 0' and 'Total: 3'. A table displays the search results with columns for 'Student Name', 'ID', 'Gr HR', 'Gender', 'Birthdate', and 'Grad Plan'.

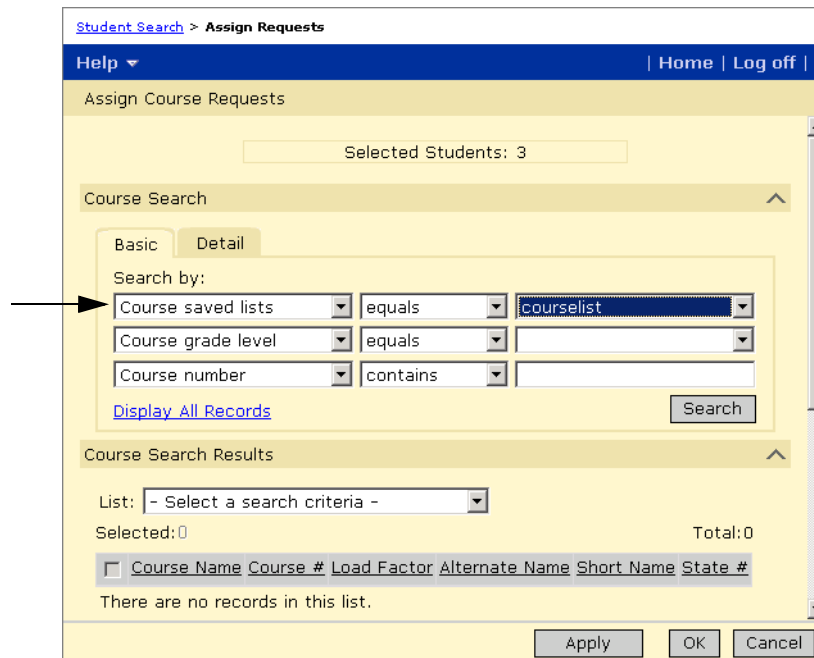
<input type="checkbox"/>	Student Name	ID	Gr	HR	Gender	Birthdate	Grad Plan
<input type="checkbox"/>	<a href="#">Abel, Catherine</a>	9999016745	9	N/A	F		
<input type="checkbox"/>	<a href="#">Abel, Robert J</a>	9903171161	8	N/A	M	Oct 6, 1992	
<input type="checkbox"/>	<a href="#">Abel, Sean</a>	9999016746	10	N/A	M		

- 3 From the Student Search Results, select the students you want to assign the course requests to.

- From the Actions menu, click Assign>Course Requests.



- On the Assign Requests page, from the first Search By field, select Course Saved List. In the third Search By field, select the name of the course saved list. Click Search.



- 6** From the course search results, select courses and do one of the following:

To	Do this
Add a course request to the students' schedules	<ul style="list-style-type: none"> <li>Click Add Request.</li> </ul>
Remove a course request from the students' schedules	<ul style="list-style-type: none"> <li>Click Remove Request.</li> </ul>
Add an alternate request to the students' schedules	<ul style="list-style-type: none"> <li>Click Add Alternate.</li> </ul>
Remove an alternate request from the students' schedules	<ul style="list-style-type: none"> <li>Click Remove Alternate.</li> </ul>

Added or removed courses are shown in the Add Requests, Remove Requests, Add Alternates, and Remove Alternates lists.

- 7** In the Priority field, specify the level of importance that the course be scheduled for the students. If you are adding more than one request or alternate, the selected priority applies to all the courses in the lists.

Enter a priority from 1 (highest) to 999 (lowest). When scheduling students, automated processes select courses with the same priority randomly. The priority is applied to required courses and electives separately, that is, you can have one set of priorities for required courses and another set for electives. The priority also determines which alternate course the Student Loader tries to load first.

- 8** From the Course Is dropdown, specify whether the course is required or an elective. If you are adding more than one request or alternate, this value applies to all the courses in the lists.

"Req/Elec - From Course" indicates that the value specified for the course in the course catalog should be used.

- 9** To assign other course requests and alternates, repeat Steps 4 to 8.

- 10** Click Apply.

The selected course requests and alternates are applied to all the selected students.





# Creating the School Master Schedule

After you set up a planning schedule with a scheduling structure and course offerings, you can start to build a master schedule. Each planning schedule has its own master schedule so you can see which scheduling scenario is best for your school. For more information about setting up a planning schedule, see “Using Planning Schedules” on page 165.

In the process of building a master schedule, you may go through a few iterations to analyze and adjust student requests, class scheduling parameters, and teacher allocations. When you are satisfied with student requests, class schedules, and teacher allocations, you can load students into your school master schedule.

## Defining Class Scheduling Options

Class scheduling options determine how Master Schedule Builder creates and schedules classes and how it loads teachers into schedules.

During the teacher allocation process, Master Schedule Builder takes into account teacher course preferences and other constraints. For teachers who have equal preferences, Master Schedule Builder allocates teachers in a “card-dealing” method, starting with the teacher with the fewest classes. If teachers have the same number of classes, teachers are allocated randomly and not alphabetically.

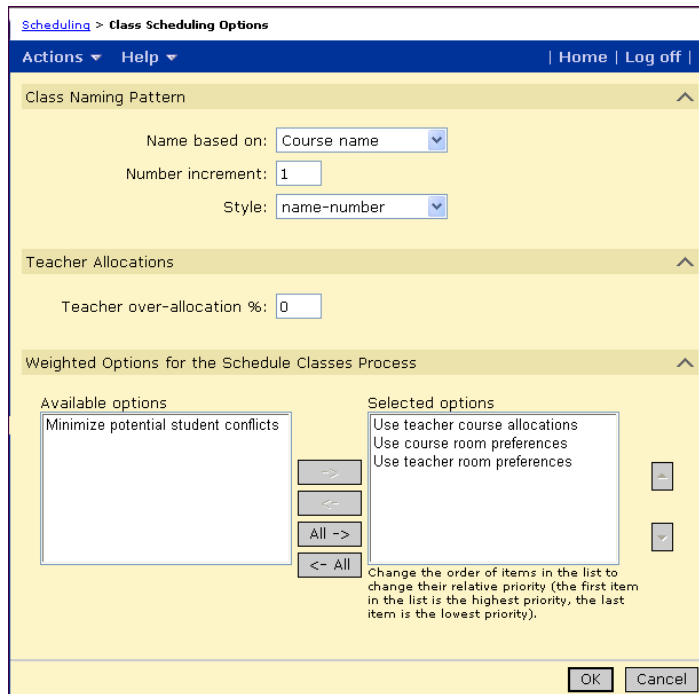
### To define class scheduling options in a planning schedule:

- 1 Log on as a school administrator.
- 2 Make sure you are using the planning calendar.  
For information about switching to a planning calendar, see “Switching to the School Planning Calendar” on page 9.
- 3 In the control bar, under Admin, click Scheduling.
- 4 On the Scheduling page, from the Planning Schedule dropdown, choose the planning schedule you want to work with.

The column to the right of the links summarizes what is set up for this planning schedule.

If you copied scheduling elements when you created the planning schedule, you can modify the scheduling elements you copied.

- On the Scheduling page, under Step 6, click Class Scheduling Options. The Class Scheduling Options page opens.



- On the Class Scheduling Options page, enter the following information:

Field	Description
Name Based On	Select whether the class name is based on the Course Name, Short Name, Alternate Name, or Course Number.
Number Increment	Enter the number to be incremented for each new class that is created, from 1 to 100.
Style	Choose the format used to display class names: <ul style="list-style-type: none"> <li>• name-number (using dash)</li> <li>• name(number) (using parentheses)</li> <li>• name[number] (using brackets)</li> <li>• name{number} (using braces)</li> </ul>

Field	Description
Teacher Over-Allocation Percentage	<p>Specify a percentage from 0 to 100. The default is 0%, which means that Master Schedule Builder never over allocates teachers.</p> <p>This percentage gives the scheduling algorithm the flexibility to shift the load beyond the teacher allocation by this percentage. A teacher's individual teaching load will never exceed its maximum.</p> <p>Depending on how high this percentage is set, a teacher might get more classes in one course and fewer classes in another course. For example, at 20%, a teacher with five classes might get one additional class (<math>20\% \times 5 = 1</math>). At 10%, a teacher with ten classes might get another class. At 34%, a teacher with six classes might get two additional classes.</p> <p>For information about setting the base teacher allocations, see "Scheduling Teachers" on page 276.</p>
Weighted Options for the Schedule Classes process	<p>Use weighted options to set which factor has priority when building schedules.</p> <p>Move weighted options so they are in order of priority. Master Schedule Builder schedules according to the order of the weighted options.</p> <p>By default, the Master Schedule Builder uses the following order of priority:</p> <ul style="list-style-type: none"> <li>• Minimize potential student conflicts</li> <li>• Use teacher course allocations</li> <li>• Use course room preferences</li> <li>• Use teacher room preferences</li> </ul>
Minimize potential student conflicts	<p>Classes are scheduled according to the conflict matrix to avoid schedule conflicts.</p> <p>If this option is moved to a higher priority than other options, student schedules have fewer conflicts, at the expense of teacher and room allocations.</p>
Use teacher course allocations	<p>Teachers are scheduled according to the settings in the Teacher Allocations page.</p> <p>If this option is not selected then teachers are allocated based only on their course preferences.</p>
Use course room preferences	<p>Classes are scheduled according to the room preferences set for courses.</p>
Use teacher room preferences	<p>Classes are scheduled according to the room preferences set for teachers.</p>

**7** Click OK.

## Analyzing Student Course Requests

Before you can analyze course requests, you must enter course requests for students. For more information about entering student course requests, see "Working with Course and Alternate Requests" on page 247.

After you set up a scheduling structure for your planning schedule, specify which courses are offered, and enter student requests for the coming year, you can analyze course requests to locate potential scheduling conflicts and fine tune the classes you need.

The Course Request Tally is a powerful tool to analyze and adjust student course requests. Use this page to:

- Work with specific courses or work with all courses. You can only work with offered courses. For information about offering courses, see “Configuring Terms and Meeting Patterns for Courses” on page 223.
- View and adjust the list of students with primary and alternate requests for courses.
- View and adjust the optimal, minimum, and maximum class size for each course.
- Search for courses with a user-defined number of potential conflicts.
- Generate a conflict matrix for selected courses or for all courses.
- Determine the number of classes you need for each course, with the option to override the calculated value.
- Create the classes needed for each course.

## Using the Course Request Tally

Use the Course Request Tally to analyze primary and alternate course requests, adjust class sizes, search for courses with potential conflicts, and generate the conflict matrix.

The following illustration provides an example of the number of primary and alternate course requests that can and cannot be scheduled, and shows which numbers Chancery SMS displays on the Course Request Tally. These numbers are filled in progressively as you do your scheduling. For more information about scheduling students, see “Loading Student Schedules” on page 307.

If there is a total of 100 requests for a course, where 80 are primary requests and 20 are alternate requests, the Course Request Tally page displays the number of primary and alternate requests. If the Student Loader can schedule 60 of the 80 primary requests, the course request tally shows the 20 primary requests that **cannot** be scheduled in the Unscheduled Primary column. If the Student Loader can schedule 10 of the 20 alternate requests, this page shows the 10 alternate requests that **can** be scheduled in the Alts Used column.

The circled numbers are displayed on the Course Requests Tally page.

	<u>Total</u>	<u>Primary</u>	<u>Alternates</u>	
<b>Requests</b>	100	80	20	Alternate Requests
<b>Scheduled</b>	70	60	10	Alternates Used
<b>Unscheduled</b>	30	20	10	

Unscheduled Primary Requests

When working with the Course Request Tally, the numbers in the Unscheduled Primary column are the problems you need to resolve.

Scheduling > Course Request Tally >

Actions Edit Reports Help | Home | Log off |

Course Search

Search Results

List: Course department equals "English"

Selected: 0 Total: 16

<input type="checkbox"/>	Course Name	Course #	Prim Reqs	Alt Reqs	Unshed Primary	Alts Used	Opt Size	Avg Size	Classes Needed	Classes Created	Lock
<input type="checkbox"/>	<a href="#">CRD-English</a>	CRD001	2	0	2	0	20	2	0	1	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">CRD-English-1S</a>	CRD010	3	0	2	0	20	3	0	1	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">CRD-English-2S</a>	CRD011	9	0	1	0	20	9	0	1	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">CRD-English-1T</a>	CRD012	2	0	1	0	20	2	0	1	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">CRD-English-2T</a>	CRD013	3	0	2	0	20	3	0	1	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">CRD-English-3T</a>	CRD014	3	0	0	0	20	3	0	1	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">CRD-English-4T</a>	CRD015	9	0	0	0	20	1	0	7	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">CRD-English-DB</a>	CRD041	6	0	0	0	20	3	0	2	<input type="checkbox"/>

Save Reset

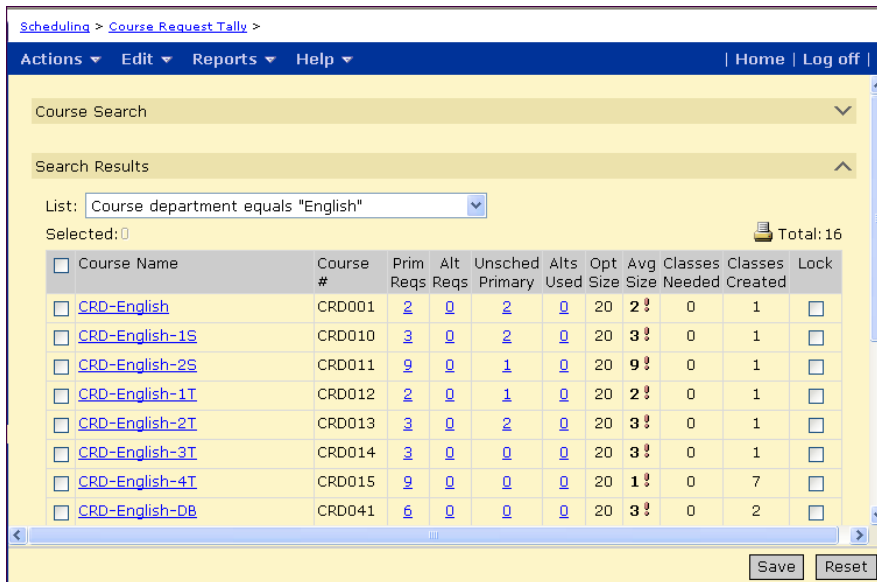
Click the number in the Unscheduled Primary column to see which students have a primary request for that course that is not scheduled. Then, try to give these students the course they requested.

The numbers in the Alts Used column are also of interest. Click the number to see the list of students whose primary request was not scheduled where an alternate request had to be used.

### To analyze course requests and adjust class size:

- 1 Log on as a school administrator.
- 2 Make sure you are using the planning calendar.  
For information about switching to a planning calendar, see "Switching to the School Planning Calendar" on page 9.
- 3 In the control bar, under Admin, click Scheduling.
- 4 On the Scheduling page, from the Planning Schedule dropdown, choose the planning schedule you want to work with, and then, under Step 6, click Course Request Tally.

- On the Course Request Tally page, search for the courses you want to work with. The Course Request Tally page includes all offered courses. For information about courses, see “Setting Up Courses” on page 140.



- Review the number of primary and alternate requests for courses, and adjust the class size for each course, if necessary.

Field	Description
Course Name and Course #	To view the Course Detail page in the course catalog, click the Course Name. From the Course Detail page, you can also view the Course Scheduling and Course Offerings pages.
Prim Reqs	The number of times this course appears as a primary request for a student. To see the students with primary requests for this course, click the number in the Prim Reqs column. To view a student’s schedule, click the student name.
Alt Reqs	The number of times this course appears as an alternate request for a student. To see the students with alternate requests for this course, click the number in the Alt Reqs column. To view a student’s schedule, click the student name.
Unshed Primary	The number of times the Student Loader could not schedule a primary request for this course. To see the students with primary requests for this course that are not scheduled, click the number in the Unshed Primary column. To view a student’s schedule, click the student name. The goal is to reduce the numbers in this column, which indicates that all students’ primary requests are scheduled.

Field	Description
Alts Used	<p>The number of times the Student Loader scheduled this course as an alternate for another course. That is, another course was not able to meet the scheduling request and this course was used to meet the request.</p> <p>To see the students that have an alternate used for this course, click the number in the Alts Used column. To view a student's schedule, click the student name.</p> <p>The goal is to reduce the numbers in this column, which indicates that students have their primary requests rather than alternate requests.</p>
% Prim Reqs Sched	<p>The percentage of primary requests scheduled out of the total number of primary requests.</p> <p>This column is not displayed by default. To display this column, from the Edit menu, click Choose columns.</p> <p><b>Note</b> This value is blank until after student schedules are loaded. For more information about loading student schedules, see "Loading Student Schedules" on page 307.</p>
% Alt Reqs Sched	<p>The percentage of alternate requests scheduled out of the total number of alternate requests.</p> <p>This column is not displayed by default. To display this column, from the Edit menu, click Choose columns.</p> <p><b>Note</b> This value is blank until after student schedules are loaded. For more information about loading student schedules, see "Loading Student Schedules" on page 307.</p>
Min Size Max Size Opt Size	<p>The Minimum and Maximum class size columns are not displayed by default. To display these columns, from the Edit menu, click Choose columns and select these fields.</p> <p>If you copied the Course scheduling information from another planning schedule, these fields are the same as in the copied planning schedule. Otherwise, these fields are copied from the school course catalog.</p> <p>You can change the class size numbers on this page by entering a different number. Changes to these fields only affect this planning schedule. These fields are not changed in other planning schedules or in the school course catalog.</p>
Avg Size	<p>Average Class Size = primary requests / actual number of classes created.</p> <p>If the average class size is below the minimum size for this course, this number is displayed in bold black with an alert icon. If the average class size is over the maximum, this number is in bold red with an alert icon.</p>

Field	Description
Classes Needed	<p>Classes Needed = primary requests / optimal class size (rounded up to a whole number).</p> <p>For example, if you have 55 primary requests and the optimal class size is 20, Chancery SMS calculates the classes needed to be 3. If you have 65 primary requests, the classes needed would be 4. If you override the optimal class size to 22, the number of classes needed changes to 3.</p> <p>If you want to change the number of classes needed, enter a different number in this column. Changes to this column affect this planning schedule only.</p> <p>A "~" beside the number indicates that the calculated number has been overridden. If this line is not locked, the next time you run Calculate Classes Needed, Master Schedule Builder replaces this number with the calculated value.</p>
Classes Created	The number of classes that have actually been created in the master schedule.
Lock	Locks the line to prevent any automatic process from changing the line. You can manually change locked items.

**7** Use Edit menu commands to help you work on the Course Tally page.

To	Do this
Choose which columns to display	<ol style="list-style-type: none"> <li><b>1</b> From the Edit menu, click Choose Columns.</li> <li><b>2</b> Move the column titles to the Selected Columns list, and click OK.</li> </ol>
Sort the search results	<ul style="list-style-type: none"> <li>• From the Edit menu, click Sort, specify the sort criteria, and click OK.</li> </ul>
Copy the minimum, maximum, and optimal class size, or the number of classes needed	<ul style="list-style-type: none"> <li>• From the Edit menu, click Copy.</li> </ul>

**8** To save your changes, click Save.

### Using the Conflict Matrix

At this stage in the scheduling process, the conflict matrix shows **potential** conflicts based on student requests and not on actual classes. Potential conflicts may not turn into real conflicts. You can always manually schedule students to avoid conflicts. The conflict matrix also shows if a student has requested the same course more than once, which your school might not allow. Either way, you can use the conflict matrix to analyze these requests.

You can create a conflict matrix for selected courses so you are not working with all the courses at once.



**To use the conflict matrix:**

- 1** Log on as a school administrator.
- 2** Make sure you are using the planning calendar.  
For information about switching to a planning calendar, see "Switching to the School Planning Calendar" on page 9.
- 3** In the control bar, under Admin, click Scheduling.
- 4** On the Scheduling page, from the Planning Schedule dropdown, select the planning schedule you want to work with.
- 5** Under Step 6, click Course Request Tally.  
OR  
Under Step 6, click Master Schedule.
- 6** Search for the course you want to work with.  
For example, to search for all courses that have only one class (singleton courses) and courses that have two classes (doubleton courses):
  - In the Course Search panel, select the Detail tab.
  - From the Category dropdown, select Courses and Classes.
  - Search for courses where the # of classes created for a course < 3.
 The Search Result panel displays a list of all singleton and doubleton courses. These courses are difficult to schedule and are usually done first.  
For more information about searching for courses, see "Searching for Courses" on page 140.
- 7** In the Search Results section, select the courses you want to work with.  
For example, within the list of singleton and doubleton courses, select those for a specific course or teacher.
- 8** From the Actions menu, click Conflict Matrix.  
Use the conflict matrix to check the number of students taking the selected courses. For example, if you selected singleton courses, make sure these courses do not meet at the same time, otherwise students cannot take more than one of them.

**NOTE**

The Master Schedule Builder automatically optimizes schedules to avoid conflicts. You can use the conflict matrix to pay special attention to these courses in the scheduling results. You might also want to manually schedule some of these students.

Field	Description
Course Name	The names of the courses you selected. To view the Course Detail page in the course catalog, click the Course Name.
Numbered row and column headings	The numbered row and column headings correspond to the Course Name. For example, row 4 is Band II and corresponds to column 4.

The Conflict Matrix page shows the number of students requesting each of the selected courses.

Scheduling > Course Request Tally > Conflict Matrix

Actions Help | Home | Log off |

Selected: 0 Total: 4

No	Course Name	1	2	3	4
<input type="checkbox"/>	1 CRD-Chemistry	1	94	92	90
<input type="checkbox"/>	2 CRD-English	94	3	94	87
<input type="checkbox"/>	3 CRD-Geography	92	94	1	87
<input type="checkbox"/>	4 CRD-Mathematics	90	87	87	1

- for all on the diagonal (courses intersecting with themselves), the number indicates the number of duplicate requests for the same course.

Course numbers

The numbers in the grid indicate the number of students that requested both courses. For example, this 90 indicates that ninety students have requested both CRD\_Chemistry and CRD\_Mathematics.

Numbers that appear in the diagonal indicate the number of students who requested the same course more than once.

Click the number to view the students' names.

- To see a list of students requesting both courses, click the link intersecting the two courses. For example, click the number on the Art I row under the Band I column to see the students requesting both Art I and Band I.

The Student List page shows each student's request information, including term preference and overrides, priority, and whether the course is required or an elective. To see a student's schedule, click the student's name.

## Creating Classes for the Coming School Year

After you have used the Course Request Tally and Conflict Matrix to fine-tune your planning schedule, and you are satisfied with student course requests and the number of classes you need, you can create classes for the coming school year.

### To determine the number of classes needed:

- Log on as a school administrator.
- Make sure you are using the planning calendar.  
For information about switching to a planning calendar, see "Switching to the School Planning Calendar" on page 9.
- In the control bar, under Admin, click Scheduling.
- On the Scheduling page, from the Planning Schedule dropdown, select the planning schedule you want to work with, and then, under Step 6, click Course Request Tally.
- Search for the courses you want to work with. For more information about searching for courses, see "Searching for Courses" on page 140.
- On the Course Request Tally page, check that you are ready to create classes – that is, the number of primary and alternate requests, and class sizes for courses are correct – and, after running the Student Loader, the number of unscheduled primary requests and alternates used is as low as possible.

- 7 Select the courses then, from the Actions menu, click Calculate Classes Needed.

Classes needed = primary requests / optimal class size.

Selected courses that are not locked are calculated and displayed in the Classes Needed column.

To override the number of classes needed, enter a different number. If you override the calculated value, click Lock so automated processes do not change it.

For more information about the number of courses needed option, see "Classes Needed" in the table on page 272.

- 8 To save your changes, click Save.

### **To create classes for courses:**

- 1 Log on as a school administrator.

- 2 Make sure you are using the planning calendar.

For information about switching to a planning calendar, see "Switching to the School Planning Calendar" on page 9.

- 3 In the control bar, under Admin, click Scheduling.

- 4 On the Scheduling page, from the Planning Schedule dropdown, select the planning schedule you want to work with, and then, under Step 6, click Course Request Tally.

- 5 Search for the courses you want to work with. For more information about searching for courses, see "Searching for Courses" on page 140.

- 6 On the Course Request Tally page, check that you are ready to create classes – that is, the number of primary and alternate requests, and class sizes and number of classes for courses are correct – and the number of unscheduled primary requests and alternates used is as low as possible.

- 7 Select the courses for which you want to create classes then, from the Actions menu, click Create Classes.

If classes have already been created for courses that are **not** locked, this command deletes and re-creates their teacher loads and class schedule information. The result is displayed in the Classes Created column. Locked courses are not processed.

- 8 When you are satisfied with the number of classes for a course, click Lock so automated processes do not change them.

- 9 To save your changes, click Save.

Continue to analyze and adjust scheduling results using the course request tally and the conflict matrix. Try to minimize unscheduled primary requests and the number of alternates. Also, check that class sizes and the number of classes needed are acceptable.

For more information about using these tools, see "Using the Course Request Tally" on page 268 and "Using the Conflict Matrix" on page 272.

### **To delete classes for courses:**

- 1 Log on as a school administrator.

- 2 Make sure you are using the planning calendar.

For information about switching to a planning calendar, see "Switching to the School Planning Calendar" on page 9.

- 3 In the control bar, under Admin, click Scheduling.

- 4 On the Scheduling page, from the Planning Schedule dropdown, select the planning schedule you want to work with, and then, under Step 6, click Course Request Tally.
- 5 Search for the courses you want to work with. For more information about searching for courses, see "Searching for Courses" on page 140.
- 6 Select the course for which you want to delete classes then, from the Actions menu, click Remove Classes.

Remove Classes is a manual command, so classes are removed whether the course is locked or not.

- 7 To save your changes, click Save.

Continue to analyze and adjust scheduling results. See "Using the Course Request Tally" on page 268 and "Using the Conflict Matrix" on page 272. Try to minimize unscheduled primary requests and the number of alternates. Also check that class sizes and the number of classes needed are acceptable.

## Scheduling Teachers

After you create classes, you can allocate teachers to those classes. You can view allocations either by course or by teacher. After you allocate teachers, you can adjust teacher course preferences, as well as teacher loads.

You can also create "placeholder" teachers for teachers you expect to start in the next school year but who are not yet part of the school staff. Placeholder teachers allow you schedule students based on the number of teachers you expect to have available.

### To create placeholder teachers:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are working in the planning calendar, on the scheduling page, from the Planning Schedule dropdown, select the planning schedule you want to use.
- 4 If you are working in the planning calendar, on the Scheduling page, under Step 6, click Teacher Allocations.

OR

If you are working in the active calendar, on the Scheduling page, under Step 5, click Teacher Allocations.

- 5 On the Teacher Allocations page, from the Actions menu, click Create Placeholder teachers.
- 6 On the Staff Scheduling Properties page, enter the information required for the placeholder teacher.

For more information about creating placeholder teachers and for descriptions of the available fields, see "Creating Placeholders for Scheduling" on page 136.

## Allocating Teachers to Classes

Use the Teacher Allocations page to allocate and schedule teachers for classes. You can allocate teachers “by course” or “by teacher”.

Allocating teachers by course gives you the option of viewing only the courses you’re working on. For example, you might want to work on the allocations for your English courses all at once without having to look at all the other courses offered at the school.

Allocating teachers by teacher gives you the option of viewing only the teachers you’re working with. For example, you might want to work on allocating teachers in your Math department for all of their courses regardless of the departments those courses are from.

On the Teacher Allocations page, you can search for the course or teacher you want to allocate or select Display All Records. The search results are grouped by course name on the By Courses tab and by teacher name on the By Teacher tab.

### To allocate teachers to classes:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are working in the planning calendar, on the scheduling page, from the Planning Schedule dropdown, select the planning schedule you want to use.
- 4 If you are working in the planning calendar, on the Scheduling page, under Step 6, click Teacher Allocations.

OR

If you are working in the active calendar, on the Scheduling page, under Step 5, click Teacher Allocations.

- On the Teacher Allocations page, click the By Course tab and search for the courses you want to allocate or click Display All Records. For more information about searching for courses, see "Searching for Courses" on page 140.

Summary row grouped by course name

Teachers eligible to teach the course.

Teacher	Pref	Sched Load Factor	FTE alloc (CrS/All)	FTE sched (CrS/All)	OT	T1 #Cls	T2 #Cls	T3 #Cls	T4 #Cls	Lock
<b>Algebra (12)</b>			1.0	.67		0/2	0/1	0/1		
<input type="checkbox"/> Adair, Rodolfo	2			.17/.67		0	0	0	0	<input type="checkbox"/>
<input type="checkbox"/> Angeli, Garnet	5			/.17		0	0	0	0	<input type="checkbox"/>
<input type="checkbox"/> Ary, Andrew	5					0	0	0	0	<input type="checkbox"/>
<b>Algebra PRE (45445)</b>			1.0	.17	0/1					
<input type="checkbox"/> Adair, Rodolfo	2			.17/.67		0				<input type="checkbox"/>
<input type="checkbox"/> Ary, Andrew	7				0					<input type="checkbox"/>
<b>AP PHYSICS - LAB (4060)</b>			1.0	1.17	0/4	0/1	0/2			
<input type="checkbox"/> Addis, Giovanni	5			.17/.33		0	0	0	0	<input type="checkbox"/>
<input type="checkbox"/> Ary, Andrew	3					0	0	0	0	<input type="checkbox"/>

OR

On the Teacher Allocations page, click the By Teacher tab and search for the teachers you want to allocate courses to or click Display all records.

Summary row grouped by teacher name

Courses the teacher is eligible to teach.

Course	Pref	Sched Load Factor	FTE alloc (CrS/All)	FTE sched (CrS/All)	OT	T1 #Cls	T2 #Cls	T3 #Cls	T4 #Cls	Lock
<b>Adair, Rodolfo</b>				.67/.67						
<input type="checkbox"/> Algebra	2	1.0		.17		0	0	0	0	<input type="checkbox"/>
<input type="checkbox"/> Algebra PRE	2	1.0		.17	0					<input type="checkbox"/>
<input type="checkbox"/> Calculus	8	1.0				0	0	0	0	<input type="checkbox"/>
<input type="checkbox"/> Calculus PRE	7	1.0								<input type="checkbox"/>
<b>Addis, Giovanni</b>				.33/.33						
<input type="checkbox"/> AP PHYSICS - LAB	5	1.0		.17		0	0	0	0	<input type="checkbox"/>
<input type="checkbox"/> Geometry	5	1.0				0	0	0	0	<input type="checkbox"/>
<input type="checkbox"/> GLOBAL STUDIES 10 R	5	1.0		.17		0	0	0	0	<input type="checkbox"/>
<input type="checkbox"/> PHYSICS-R w/LAB	5	1.0								<input type="checkbox"/>

The following table describes the fields and headings on the Teacher Allocations page:

Field	Description
Total FTE (alloc./sched.) for search results	The total FTE value of all teachers or courses in the search results. This value includes both allocated and scheduled FTE.
Course name/teacher headings	<p>On the By Course tab, search results are grouped by course name and number. The course name headings are summary rows showing subtotals for scheduling load, classes created, and FTE by course. To open the Course Offerings page, click the course name.</p> <p>OR</p> <p>On the By Teacher tab, search results are grouped by teacher. The teacher headings are summary rows showing subtotals for scheduling load, classes created, and FTE by course. To open the Course Offerings page, click the course name.</p>
Course/Teacher	<p>On the By Course tab, lists the teachers eligible to teach the courses.</p> <p>OR</p> <p>On the By Teacher tab, lists the courses the teacher is eligible to teach.</p> <p>A teacher is eligible to teach a course when that course is specified as a preferred course in the teacher's scheduling preferences on the Staff Scheduling Properties page. To open the Staff Scheduling Properties page, click the teacher name. For more information, see "Setting Staff Scheduling Properties" on page 132.</p>
Pref.	<p>The teacher's preference for teaching this course, where 1 is the highest and 9 is the lowest. Master Schedule Builder does not schedule teachers with a preference of 9. Use preference 9 to designate teachers as spares that you can manually schedule later.</p> <p>You can change the teacher preference on this page. Changing the teacher preference here changes it in the staff record and affects all planning schedules.</p>
Sched. Load Factor	Displays the scheduling load factor that is assigned at the district. For more information about assigning scheduling load factors, see "Setting Up Staff for Scheduling" on page 132.

Field	Description
FTE Alloc (Crs/All)	<p>Shows the FTE allocation of each teacher for each course. This column has three numbers: one beside each course name and two beside each teacher name.</p> <p>The number beside the course name is the total number of FTEs allocated to this course.</p> <p>The two numbers beside each teacher name apply only to that teacher for that course. The number on the left is the FTE allocated to that teacher. The number on the right is the sum of the FTE for all the courses allocated to that teacher.</p> <p>FTE allocated = (sum of classes allocated for all terms * course scheduling load) / full-time teacher load where:</p> <ul style="list-style-type: none"> <li>• the "sum of classes allocated for all terms" is the sum of all the #Cls columns.</li> <li>• The "course scheduling load" is in the Sched Load Factor column.</li> <li>• The "full-time teacher load" is the Maximum Scheduling Load defined in "Setting Staff Scheduling Properties" on page 132.</li> </ul> <p>The sum of the FTE for all courses is the same whenever this teacher's name appears.</p> <p>When you change the numbers in the #Cls columns, the calculated values in this column change accordingly.</p>
FTE Sched (Crs/All)	<p>This column shows the FTE value of all the classes for each course that each teacher is scheduled to teach. This column has three numbers: one beside each course name and two beside each teacher name.</p> <p>The number beside the course name is the total number of FTEs scheduled for that course.</p> <p>The two numbers beside each teacher name apply only to that teacher for that course. The number on the left is the FTE scheduled for that teacher. The number on the right is the sum of the FTE for all the courses scheduled for that teacher.</p> <p>FTE scheduled = (sum of classes scheduled for all terms * course scheduling load) / full-time teacher load where:</p> <ul style="list-style-type: none"> <li>• the "sum of classes scheduled for all terms" is the sum of all the #Cls columns.</li> <li>• The "course scheduling load" is in the Sched Load Factor column.</li> <li>• The "full-time teacher load" is the Maximum Scheduling Load defined in "Setting Staff Scheduling Properties" on page 132.</li> </ul> <p>The sum of the FTE for all courses is the same whenever this teacher's name appears.</p>



Field	Description
# Cls (one column for each term and one for the year)	<p>Shows the number of classes required and allocated for each course. The number of columns depend on how many terms you defined.</p> <p>On the By Course tab, the numbers beside each course name heading indicate the number of classes allocated/the number of classes required. The number beside each teacher name indicates the number of classes allocated to that teacher.</p> <p>OR</p> <p>On the By Teacher tab, the number beside each teacher name heading indicates the total number of classes allocated to that teacher. The number beside each course name indicates the number of classes for that course that are allocated to that teacher.</p> <p>You can manually change the number of classes allocated to each teacher, or select the course or teacher and select Action &gt; Allocate Teachers. When you change the numbers in these columns, the numbers in the FTE alloc column change accordingly.</p>
Lock	Locks the line to prevent any automatic processes from changing the line. You can manually change locked items.

**6** To allocate teachers, from the Actions menu, click Allocate Teachers.

You can also manually allocate teachers to classes by selecting the teacher or course and then entering the number of classes in the # Cls columns.

To use a mixture of automatic and manual teacher allocations, manually enter the allocations for some teachers or courses, and then click Lock for those teachers or courses. From the Actions menu, click Allocate Teachers to automatically allocate teachers for courses that are not locked.

When you are satisfied with a teacher's or course's allocation, click Lock so that Master Schedule Builder does not change it.

**7** Click Save.

**To clear teacher loads:**

**1** On the Teacher Allocations page, select the By Courses or By Teachers tab.

**2** On the By Courses tab, select the courses you want to remove from teacher loads.

OR

On the By Teachers tab, select the teachers whose loads you want to clear.

**3** From the Actions menu, click "Clear loads for selected teachers".

"Clear loads for selected teacher" is a manual command so teacher loads are cleared regardless of lock status.

**4** Click Save.

## Understanding the Master Schedule Page

You can use the Master Schedule page to schedule courses, teachers, or rooms either manually or automatically.

### To open the Master Schedule page:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, from the Planning Schedule dropdown, select the planning schedule.

For information about switching to a planning calendar, see "Switching to the School Planning Calendar" on page 9.

- 4 If you are using the active calendar, on the Scheduling page, under Step 5, click Master Schedule.






OR

If you are using a planning calendar, on the Scheduling page, under Step 6, click Master Schedule.

The Master Schedule page opens.



The following table describes the fields and menu commands on the Master Schedule page. Some options are only available in one tab.

Field	Description
Heading bar	<p>On each tab, classes are sorted based on the selected tab.</p> <p>On the By Course tab, the heading bar shows the course name and course number. To open the Course Scheduling page, click the course name.</p> <p>On the By Teachers tab, the summary heading row shows the teacher name and their FTEs. The first number in the FTE is the sum of the teacher's scheduled classes divided by the district full-time teaching load. If the teacher's teaching load is the same as the district default, the second number in the FTE is 1.0. If the teacher's default has been overridden, the second number is the overridden teaching load divided by the district full-time teaching load. To open the teacher scheduling page, click the teacher name.</p> <p>On the By Room tab, the heading bar shows the room name and building name. To view or edit room information, click the room name.</p>
Add Class (on By Course tab)	Adds a class to the course beside the button. The new class row is automatically highlighted so you can use the Class Information section to enter the details and schedule of the new class.
Add (on By Teacher tab)	Adds selected classes to the teacher beside the button. Clicking this button is the same as clicking the teacher name in a class schedule on the By Course tab.
Add (on By Room tab)	Adds selected classes to the room beside this button. Clicking this button is the same as clicking the room number in a class schedule on the By Course tab.
Status	<p>Indicates whether the class has any conflicts.</p> <p>This column is blank until you run Master Schedule Builder or until you click Save after making manual changes. It is also blank if the class has no conflicts.</p> <p> The class is full – that is, it has reached its capacity. If you use overfill then this is capacity + overfill percentage.</p> <p> The class is overfull – that is, it has exceeded its capacity. If you use overfill then this is capacity + overfill percentage.</p> <p> A teacher conflict for this class – that is, this class is scheduled but the teacher is scheduled for another class in the same period.</p> <p> A room conflict for this class – that is, this class is scheduled but the room is assigned to another class at the same time.</p> <p> This class is part of a combined set of classes.</p>
Class Name	<p>The class and section name of the class.</p> <p>To view or edit class information, click the class name.</p>
Term	The term the class is offered. The list of terms displayed for a class is controlled by the Course Offerings & Meeting Patterns settings for the course.

Field	Description
Mtg Pat	The meeting pattern for the class. The list of meeting patterns displayed for a class is controlled by the Course Offerings & Meeting Patterns settings for the course. Part of this definition includes different meeting patterns for different scheduling groups, so if you change the scheduling group for the class, the list of meeting patterns changes as well.
Teacher (on By Course and By Room tabs)	The teacher scheduled for the class.
Room (on By Course and By Teacher tabs)	The room scheduled for the class.
# Students	<p>The number of students assigned to the class in the following format: &lt;current #&gt; (&lt;high water #&gt;)/&lt;class capacity&gt; where:</p> <p>&lt;current #&gt; is the number of students in the class as of the current date or the date set in the Changes Effective field (active calendar) or the number of students on the first day of classes (planning calendar).</p> <p>&lt;high water #&gt; is the highest number of students that the class has from this point in the school year forward.</p> <p>&lt;class capacity&gt; is the capacity of the class from the class schedule data.</p> <p>For example: 27 (31)/30 indicates that there are currently (or on the effective date) 27 students in the class and at one time during the year (after the effective date), the class will be (or was) at 31 students.</p> <p>To open the Class Roster page, click the link.</p> <p>For more information about class rosters, see "Working with Homeroom and Class Rosters" on page 349.</p>
Lock	Locks the line to prevent any automatic process from changing the line. You can manually change locked items.
Class Information section (on By Course tab)	<p>This section shows the highlighted class's name, number, capacity, class code, scheduling group, and team.</p> <p>You can change class information in this section.</p>
Class Constraints section (on By Course tab)	<p>This section shows the constraints that are available and applied to the class.</p> <p>Constraints available, but not applied, to the class are listed in the Available Constraints list. Constraints applied to the class are shown in the Selected Constraints list. Constraints that are mandatory for the class are shown in the Mandatory Constraints list.</p> <p>You can move constraints between the Available Constraints and the Selected Constraints lists. You cannot removed mandatory constraints.</p> <p>For more information about constraints, see "Setting Up Constraints" on page 197.</p>

Field	Description
Class Schedule section (on By Course tab)	This section shows the highlighted class's terms, meeting pattern, teachers, and room. You can change class schedule details in this section. If your changes create conflicts, an appropriate message is displayed.

## Creating School Master Schedules

In the active calendar, you can use the Master Schedule page to modify class schedules as needed throughout the school year.

In the planning calendar, you can create any number of planning schedules. In each planning schedule, after you have created classes and allocated teachers to them, you can create the master schedule for your school for the coming school year.

You can use the Master Schedule Builder to automatically schedule by course, teacher, or room to build a master schedule for your school. You can also build part or all of the schedule manually.

### NOTE

The checkbox in the Lock column indicates that the automated processes, such as Master Schedule Builder or Student Loader, will not change that item. You can make changes manually regardless of the lock status.

## Automatically Scheduling Classes

- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.
- 3 On the Master Schedule page, click the By Course, By Teacher, or By Room tab.
- 4 Expand a Search panel and search for courses, teachers, or rooms.
- 5 Select the classes you want to schedule and, from the Actions menu, click Schedule Classes. Click OK.

Master Schedule Builder assigns a meeting pattern, teacher, and room to the selected classes based on class scheduling options. For more information about class scheduling options, see "Defining Class Scheduling Options" on page 265.

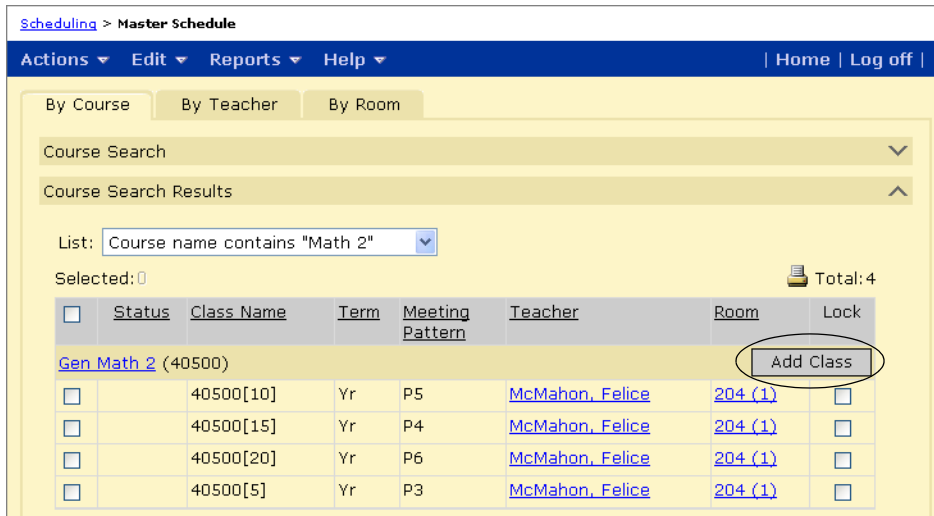
## Manually Adding Classes to Courses

You can add classes to courses and assign class information and scheduling settings. If you change class scheduling details in a planning calendar after students have been scheduled, Chancery SMS displays a warning message that the changes may create scheduling conflicts.

### To manually add classes to courses:

- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.

- 3 On the Master Schedule page, click the By Course tab.
- 4 Expand the Course Search panel and search for courses.  
The search results are grouped by course name and number.
- 5 In the heading row for a course, click Add Class.

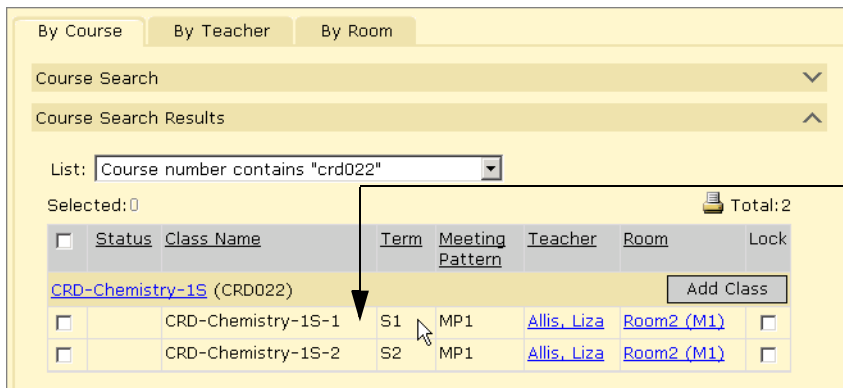


- 6 Once the class is added for the course, you can select it and edit the class details.  
For more information, see "Editing Class Details" on page 286.

## Editing Class Details

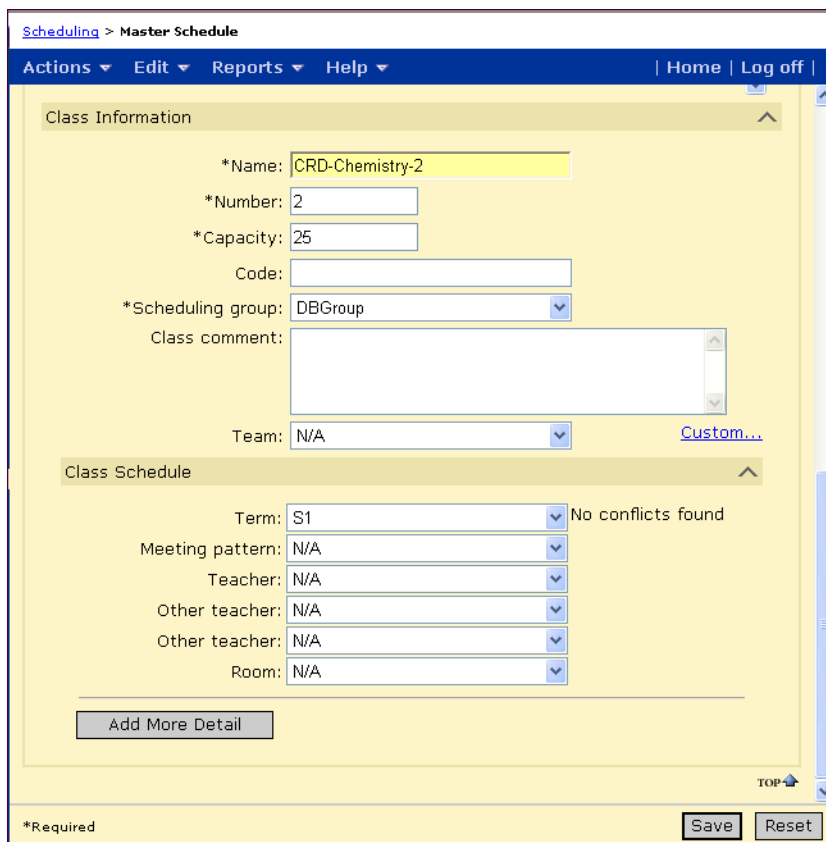
- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.
- 3 On the Master Schedule page, click the By Course tab.
- 4 Expand the Course Search panel and search for courses.  
The search results are grouped by course name and number.

- In the Course Search Results, click the row of the class you want to edit, being careful not to click a link. When you click in the row for a class, the focus moves to that class.



To focus on a class and display class details, click the class row without clicking any links.

The Class Information, Class Constraints, and Class Schedule sections open at the bottom of the page.



- 6** In the Class Information section, enter the following information, as required:

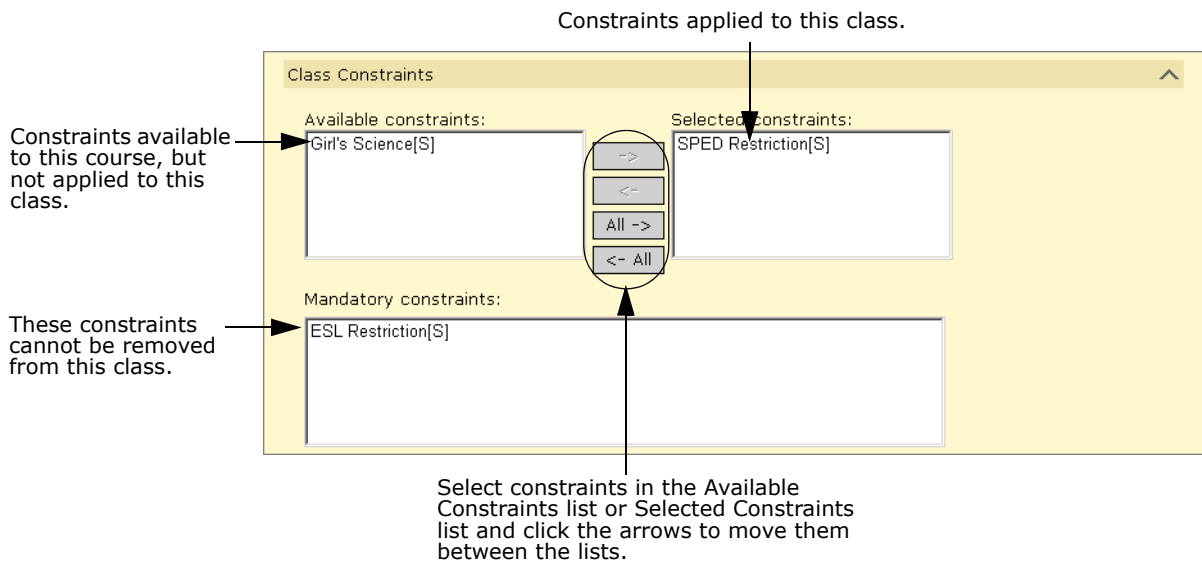
<b>Field</b>	<b>Description</b>
Name	Specify the class name. By default, Chancery SMS creates a class name using the course name and adding a sequential number for each added class.
Number	Specify the class number. By default, Chancery SMS assigns a sequential number to all classes for a course.
Capacity	Enter the maximum number of students that can be assigned to this class. If class capacity exceeds either the course maximum or the room capacity, Chancery SMS displays a warning message. You can override the class capacity.
Code	Enter a code for the class (optional).
Scheduling Group	Select the scheduling group this class is assigned to. The specified scheduling group determines which meeting patterns are available to this class.
Class Comment	Enter a comment for the class.
Team	Select the team you want to assign this class to. For more information about teams, see "Setting Up Team Loading Rules" on page 218.
Custom	Click this link to see custom fields added to the page.

- 7** Scroll down to the Class Constraints section and review the constraints for the class. Constraints available, but not applied, to the class are listed in the Available Constraints list. Constraints applied to the class are shown in the Selected Constraints list. Constraints that are mandatory for the class are shown in the Mandatory Constraints list. For more information about constraints, see "Setting Up Constraints" on page 197.
- 8** To change the constraints applied to this class, select the constraint in the Available Constraint or Selected Constraints list and move it to the appropriate list.



**NOTE**

Mandatory constraints cannot be removed from the class.



- 9 Scroll down to the Class Scheduling section and enter the following information, as required:

Field	Description
Term	Specify the term this class is offered.
Meeting Pattern	Specify a meeting pattern for this class. The meeting patterns available depend on the scheduling group selected in the Class Information section.
Teacher	Select the primary teacher assigned to this class.
Other Teacher	Select another teacher to assign to this class (optional).
Other Teacher	Select another teacher to assign to this class (optional).
Room	Select a room where this class is taught.

- 10 To add another schedule for this class, click Add More Detail.

**NOTE**

Tennessee customers only: EIS reporting does not support additional class information entered using the Add More Detail option.

- 11 Click Save.

## Manually Assigning and Removing Classes for Teachers

**To assign classes to teachers:**

- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.

For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.

- 3 On the Master Schedule page, click the By Teacher tab.
- 4 Expand the Teacher Search panel and search for teachers.  
The search results are grouped by teacher name.
- 5 Expand the Class Search tab and search for classes.
- 6 In the class search results, select the class you want to add to a teacher's schedule.
- 7 In the heading row for the teacher you want to add the course to, click Add.

**To remove a class from a teacher's schedule:**

- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.
- 3 On the Master Schedule page, click the By Teacher tab.
- 4 Expand the Teacher Search panel and search for teachers.  
The search results are grouped by teacher name.
- 5 Select the class you want to remove from a teacher's schedule. From the Actions menu, click Remove From Schedule.

## **Manually Assigning and Removing Classes for Rooms**

**To assign classes to rooms:**

- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.
- 3 On the Master Schedule page, click the By Room tab.
- 4 Expand the Room Search panel and search for rooms.  
The search results are grouped by room name.
- 5 Expand the Class Search tab and search for classes.
- 6 In the class search results, select the class you want to assign to a room.
- 7 In the heading row for the room you want to add the class to, click Add.

**To remove a class from a room's schedule:**

- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.
- 3 On the Master Schedule page, click the By Room tab.
- 4 Expand the Room Search panel and search for rooms.  
The search results are grouped by room name.

- 5 Select the class you want to remove from a room's schedule. From the Actions menu, click Remove From Schedule.

## Locking Classes in the Master Schedule

If you want to prevent Master Schedule Builder from changing scheduled classes, you can lock the classes.

### To lock a single class:

- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.
- 3 On the Master Schedule page, click the By Course, By Teacher, or By Room tab.
- 4 Expand a search panel and search for courses, teachers, or rooms.
- 5 In the search results, in the Lock column, select the checkbox for any classes you want to lock.

### To lock all classes:

- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.
- 3 On the Master Schedule page, click the By Course, By Teacher, or By Room tab.
- 4 Expand a search panel and search for courses, teachers, or rooms that have classes you want to lock.
- 5 From the Actions menu, click Lock All Classes.  
All scheduled classes that were in the search results are locked.

### To unlock all classes:

- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.
- 3 On the Master Schedule page, click the By Course, By Teacher, or By Room tab.
- 4 Expand a search panel and search for courses, teachers, or rooms that have classes you want to lock.
- 5 From the Actions menu, click Unlock All Classes.  
All scheduled classes that were in the search results are unlocked.

## Working With Class Combining


You can specify that two classes are combined. In a future release, combined classes will have a joint roster and attendance page. To combine classes, both classes must have the same schedule, that is, they must meet in the same room, be assigned the same teacher, and have the same meeting pattern.

### NOTE

Even when classes are combined, the conflict icon still indicates a teacher and room conflict for the combined classes.

### To combine classes:

- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.
- 3 On the Master Schedule page, click the By Course, By Teacher, or By Room tab.
- 4 Expand the Course Search panel and search for courses.  
The search results are grouped by course name and number.
- 5 Select two or more classes that have the same class schedules, that is, they are assigned the same teacher, room, and meeting pattern.
- 6 From the Edit menu, click Combine Classes.
- 7 In the Combine Classes dialog, enter a name for the combined class.
- 8 Click OK.

The Combined Class icon () displays in the status column for the combined classes. Pause the cursor over this icon to see the name of the combined class.


### To change the name of a combined class:

- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.
- 3 On the Master Schedule page, click the By Course, By Teacher, or By Room tab.
- 4 Expand the Course Search panel and search for the course.
- 5 In the search results, select a combined course. From the Edit menu, click Edit Class Combination.
- 6 In the Edit Class Combination dialog, enter a new name for the class combination. Click OK.

### To uncombine classes:

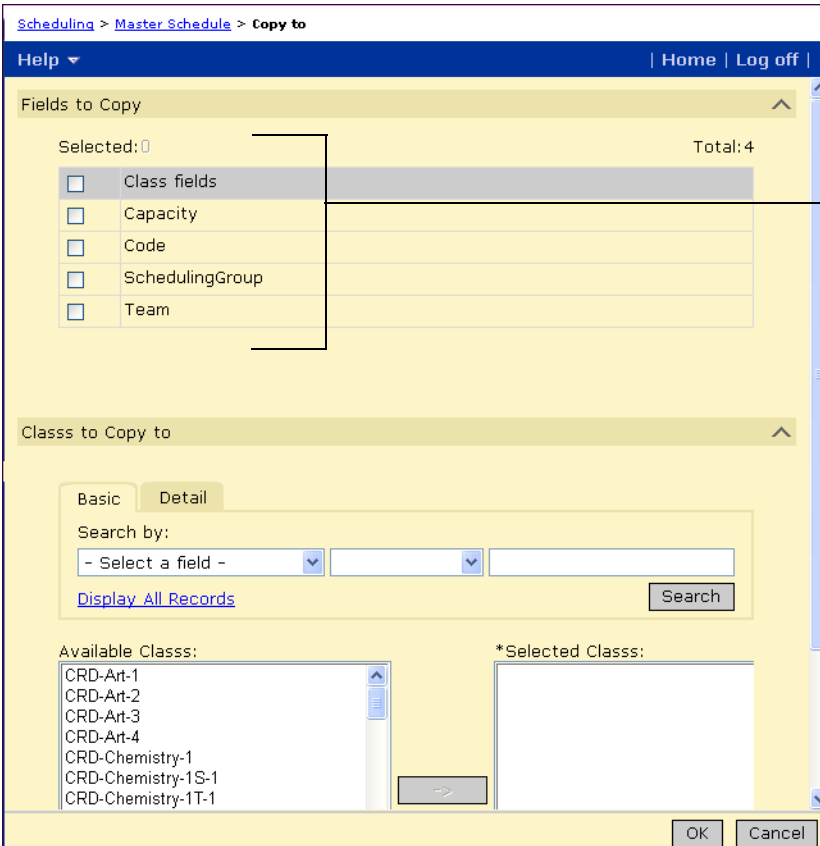
- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see "Understanding the Master Schedule Page" on page 282.
- 3 On the Master Schedule page, click the By Course, By Teacher, or By Room tab.

- 4 Expand the Course Search panel and search for the course.
- 5 In the search results, select a combined course. From the Edit menu, click Uncombine Class. Click OK.

The Combined Class icon (  ) is removed from the status column for all classes in the combination.

## Copying Class Settings

- 1 Log on as a school administrator.
- 2 Open the Master Schedule page.  
For more information about opening the Master Schedule page, see “Understanding the Master Schedule Page” on page 282.
- 3 On the Master Schedule page, click the By Course, By Teacher, or By Room tab.
- 4 Expand the Course Search panel and search for courses.  
The search results are grouped by course name and number.
- 5 In the search results, select the class whose settings you want to copy to other courses. From the Edit menu, click Copy Fields.
  - On the Copy To page, under Fields to Copy, select the settings you want to copy to other courses.



The screenshot shows the 'Copy to' dialog box. The 'Fields to Copy' section is highlighted with a yellow background. A bracket points to the 'Class fields' checkbox, which is selected. The 'Classes to Copy to' section is also highlighted with a yellow background. It contains a search field with a dropdown menu, a search button, and two lists: 'Available Classes' and '\*Selected Class:'. The 'Available Classes' list contains the following items: CRD-Art-1, CRD-Art-2, CRD-Art-3, CRD-Art-4, CRD-Chemistry-1, CRD-Chemistry-1S-1, and CRD-Chemistry-1T-1. The '\*Selected Class:' list is empty. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Class fields available to be copied to other classes.

- 6 Under Class to Copy To, search for classes. In the Available Classes list, select the classes you want to copy the settings to and use the arrows to move the classes to the Selected Classes list.
- 7 Click OK.

## Creating Lunch Periods

In Chancery SMS, lunch periods are treated as any other class. If your school requires a specific arrangement for lunch periods, such as split lunches, you can customize the Chancery SMS configuration. The following examples illustrate how you could create lunches for the following scenarios:

- “Full Period Lunches - Example” on page 294
- “Four Lunch - Split Period with Length Difference - Example” on page 298

### NOTE

These examples are intended to provide ideas of how you might configure lunches for your school. They do not encompass all possibilities or methods for creating lunches with Chancery SMS.

## Full Period Lunches - Example

The easiest method of assigning lunches is to treat it as a regular full period class. For this example, assume that the school lunch period fits within a regular class period. The school also contains more students than can be accommodated in the cafeteria at one time, so lunch is offered in two periods.

For this example, assume the school is using the following bell schedule:

Period 1	8:30 - 9:25
Period 2	9:30 - 10:25
Period 3/Lunch	10:30 - 11:25
Period 4/Lunch	11:30 - 12:25
Period 5	12:30 - 1:25
Period 6	1:30 - 2:25

To accommodate this bell schedule, create a lunch course and assign it to a meeting pattern that meets every day in period 3 or every day in period 4. When you assign the lunch course request to all students in the school and generate student schedules, each student is assigned a lunch period for either period 3 or period 4.

### NOTE

**For Tennessee customers only:** Make sure lunch minutes are deducted from the student standard day. You cannot count lunch as part of the standard day.

### To create a lunch course:

- 1 Log on as a school administrator.
- 2 The district administrator must create a lunch course with the following settings and assign it to your school:
  - Collect attendance = disabled (on Course Detail page)

- Course is = required (on Course Detail page)
- Collect grades for this course = disabled (on Course Grading page)

For assistance, contact your district administrator.

**3** At the school, assign a room to the lunch course.

Make sure you assign a room that is large enough to accommodate all the students.

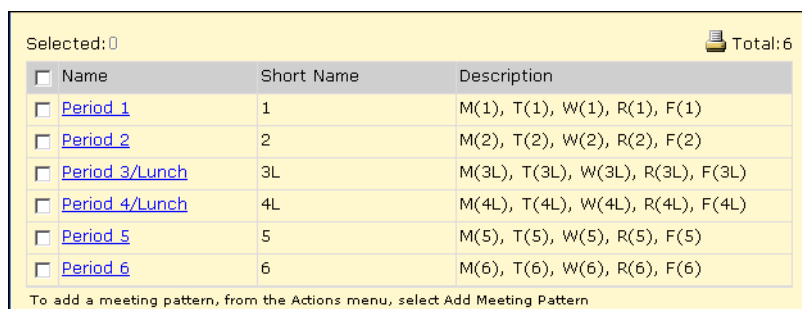
For more information about assigning rooms, see “Assigning Rooms to Courses” on page 148.

**To set up the lunch meeting patterns:**

- 1** On the Scheduling page, click Meeting Patterns.
- 2** From the Meeting Patterns for Scheduling Group dropdown, select the scheduling group.
- 3** From the Actions menu, click Add Meeting Pattern and add the meeting patterns required for classes and lunches as shown in the following table:

Name	Short Name	Periods (for each regular day)
Period 1	1	1
Period 2	2	2
Period 3/Lunch	3L	3
Period 4/Lunch	4L	4
Period 5	5	5
Period 6	6	6

The following figure shows the meeting patterns when the bell schedule includes a regular day for each day of the week.



- 4** On the Scheduling page, click Course Offerings and Meeting Patterns.
- 5** Select the lunch course and, from the Actions menu, select Edit Course Offerings.
- 6** In the Scheduling Group section, click on the row containing the scheduling group you want to work with. The available meeting patterns are listed in the Meeting Patterns section.

**7** Select the following meeting patterns and move them to Selected Patterns.

- Period 3/Lunch
- Period 4/Lunch

The screenshot shows a web interface for configuring a 'Lunch' course. At the top right is a 'Copy' link. Below is an 'Offerings' table with columns: Scheduling Group, Term Set, Default Offering, Allowed Offering, and Meeting Patterns. Two rows are visible: 'Freshman & Sophomore' with 'Semesters' term set, 'Default' checked, 'Allowed' checked, and 'Meeting Patterns' count of 0; and 'Junior & Senior' with 'Semesters' term set, 'Default' unchecked, 'Allowed' checked, and 'Meeting Patterns' count of 10. Below the table is a note: 'Select a default offering to make the course available for scheduling (deselect the default to remove the course from scheduling). This will determine the term set used for classes when they are initially created. Select allowed offerings to allow users to schedule classes manually to different term sets.' Below this is the 'Meeting Patterns' section, which shows 'Selected scheduling group/term set: Freshman & Sophomore /Semesters'. It has two columns: 'Available patterns' (Period 1, Period 2, Period 5, Period 6) and 'Selected patterns' (Period 3/Lunch, Period 4/Lunch). Between these columns are buttons: '->', '<-', 'All ->', and '<- All'. At the bottom are 'Save' and 'Reset' buttons, and a '\*Required' label.

To see the available meeting patterns, click in a scheduling group row without clicking on a link.

**8** Click Save.

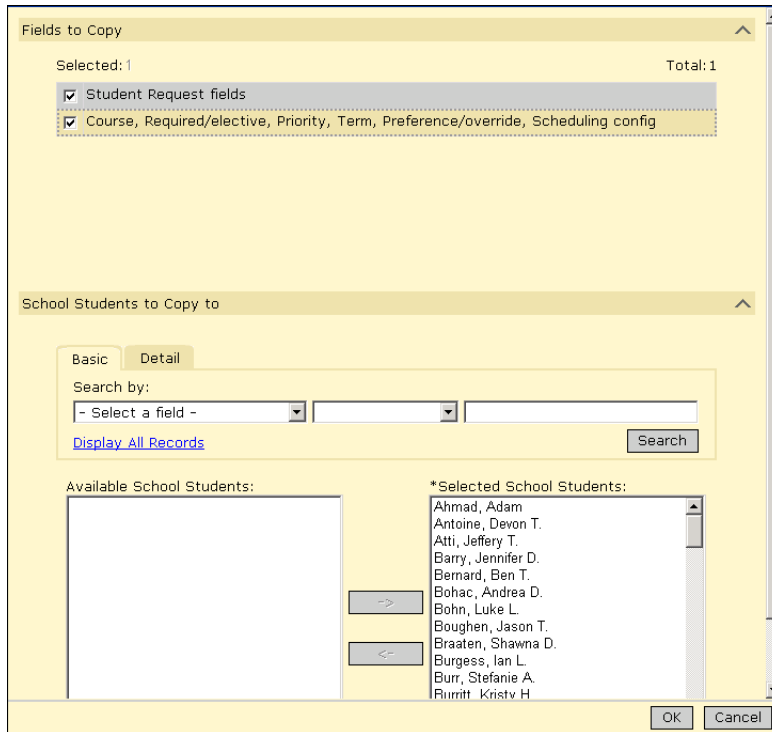
**To assign lunch course request to students and create lunch classes:**

- 1** Log on as a school administrator.
- 2** Search for students and, from the search results, select all students who require lunch.
- 3** From the Actions menu, select Open Student > Schedule.
- 4** On the Student Schedule page, click the Course Request tab.
- 5** In the Course # field, enter the course number for the lunch course and click Add.
- 6** In the Course Request list, select the lunch course and, from the Actions menu, click Copy Fields > Course Requests.
- 7** In the Fields to Copy section, select Student Course Requests and, in the School Students to Copy to section, select all the students who require lunch and move them to the Selected School Students list. Click OK.



**NOTE**

When you select the students to copy the course requests to, make sure you do not select the student you are copying course requests from, or that student will have duplicate course requests.



- 8 Click Home.
- 9 In the control bar, click Scheduling and then click Course Request Tally.
- 10 Locate and select the lunch course.
- 11 From the Actions menu, click Calculate Classes Needed.

OR

In the Classes Needed field, enter the number of lunch classes required to accommodate all the students in the school. Since the school cannot accommodate all the students in the cafeteria at one time, specify two lunch classes.

- 12 Use the student loader to generate student schedules.  
Each student is assigned a lunch period in either period 3 or period 4.

## Four Lunch - Split Period with Length Difference - Example

This example illustrates a method for configuring split lunches when the lunch period is 30 minutes and classes are 40 minutes. A lunch course is created and assigned to a meeting pattern. Since lunch is a separate course, it has its own roster.

For this example, assume that the school is using the following regular day schedule:

Period 1	7:49 - 8:29
Period 2	8:32 - 9:13
Period 3	9:17 - 9:57
Period 4	10:01 - 10:41
Period 5	10:45 - 12:43 (includes two 40 minute classes and one 30 minute lunch, which can occur in any order)
Period 6	12:47 - 1:27
Period 7	1:31 - 2:11
Period 8	2:15 - 2:55

Students can have any one of the following three options for period 5:

Option 1	Option 2	Option 3
Lunch (10:45 - 11:15)	Class (10:45 - 11:25)	Class (10:45 - 11:25)
Class (11:19 - 11:59)	Class (11:29 - 12:09)	Lunch (11:29 - 11:59)
Class (12:03 - 12:43)	Lunch (12:13 - 12:43)	Class (12:03 - 12:43)

To accommodate this schedule in Chancery SMS, you can create a bell schedule that includes small blocks of time that can be combined in meeting patterns and assigned to courses to allow period 5 to include two 40 minute classes and a 30 minute lunch.

### Before you begin:

- The district administrator must create a lunch course and assign it to your school. The lunch course should not collect grades or attendance, and it should be required.  
For assistance, contact your district administrator.
- At the school, assign the cafeteria as the required room for the lunch course.  
For more information about assigning rooms see "Assigning Rooms to Courses" on page 148.

### To create the bell schedule:

- 1 Log on as a school administrator.
- 2 In the control panel, click Scheduling.
- 3 On the Scheduling page, click Bell Schedule.
- 4 From the Scheduling Group dropdown, select the scheduling group.

- 5 From the Actions menu, click Add Period and enter information about the period. Repeat this step to create all the periods listed in the following table:

Start time	End Time	Period Name	Label
7:49	8:29	Period 1	P1
8:32	9:13	Period 2	P2
9:17	9:57	Period 3	P3
10:01	10:41	Period 4	P4
10:45	11:15	Period 5 - Module 1	M1
11:15	11:19	Period 5 - Module 2	M2
11:19	11:25	Period 5 - Module 3	M3
11:25	11:29	Period 5 - Module 4	M4
11:29	11:59	Period 5 - Module 5	M5
11:59	12:03	Period 5 - Module 6	M6
12:03	12:09	Period 5 - Module 7	M7
12:09	12:13	Period 5 - Module 8	M8
12:13	12:43	Period 5 - Module 9	M9
12:47	1:27	Period 6	P6
1:31	2:11	Period 7	P7
2:15	2:55	Period 8	P8

- 6 Click Copy To Other Days and copy the bell schedule to all the regular days in the schedule. Click OK.
- 7 On the Bell Schedule page, click OK.

### To create the meeting patterns:

- 1 On the Scheduling page, click Meeting Patterns.
- 2 In the Meeting Patterns for Scheduling Group dropdown, select the scheduling group.
- 3 From the Actions menu, click Add Meeting Pattern and enter the meeting patterns required for classes in periods 1 to 4 and 6 to 9 then enter the following meeting patterns for period 5:

#### NOTE

When entering meeting pattern information, short periods may not be visible on the meeting pattern matrix. To show all periods, from the Actions menu, click Zoom to Maximum.

Name	Short Name	Periods (for each regular day)
Period 5a Class	5aC	M1, M2, M3
Period 5a Lunch	5aL	M1
Period 5b Class (following 5aC)	5bC1	M5, M6, M7
Period 5b Class (following 5aL)	5bC2	M3, M4, M5
Period 5b Lunch	5bL	M5
Period 5c Class	5cC	M7, M8, M9

Name	Short Name	Periods (for each regular day)
Period 5c Lunch	5cL	M9

The following figure shows the meeting patterns when the bell schedule includes a regular day for each day of the week.

Selected: 0 Total: 14

<input type="checkbox"/> Name	Short Name	Description
<input type="checkbox"/> <a href="#">Period 1</a>	1	M(1), T(1), W(1), R(1), F(1)
<input type="checkbox"/> <a href="#">Period 2</a>	2	M(2), T(2), W(2), R(2), F(2)
<input type="checkbox"/> <a href="#">Period 3</a>	3	M(3), T(3), W(3), R(3), F(3)
<input type="checkbox"/> <a href="#">Period 4</a>	4	M(4), T(4), W(4), R(4), F(4)
<input type="checkbox"/> <a href="#">Period 5a Class</a>	5aC	M(L1), M(L2), M(L3), T(L1), T(L2), T(L3), W(L1), W(L2), W(L3), R(L1), R(L2), R(L3), F(L1), F(L2), F(L3)
<input type="checkbox"/> <a href="#">Period 5a Lunch</a>	5aL	M(L1), T(L1), W(L1), R(L1), F(L1)
<input type="checkbox"/> <a href="#">Period 5b from 5aC</a>	5bC1	M(L5), M(L6), M(L7), T(L5), T(L6), T(L7), W(L5), W(L6), W(L7), R(L5), R(L6), R(L7), F(L5), F(L6), F(L7)
<input type="checkbox"/> <a href="#">Period 5b from 5aL</a>	5bC2	M(L3), M(L4), M(L5), T(L3), T(L4), T(L5), W(L3), W(L4), W(L5), R(L3), R(L4), R(L5), F(L3), F(L4), F(L5)
<input type="checkbox"/> <a href="#">Period 5b Lunch</a>	5bL	M(L5), T(L5), W(L5), R(L5), F(L5)
<input type="checkbox"/> <a href="#">Period 5c Class</a>	5cC	M(L8), M(L7), M(L9), T(L8), T(L7), T(L9), W(L8), W(L7), W(L9), R(L8), R(L7), R(L9), F(L8), F(L7), F(L9)
<input type="checkbox"/> <a href="#">Period 5c Lunch</a>	5cL	M(L9), T(L9), W(L9), R(L9), F(L9)
<input type="checkbox"/> <a href="#">Period 6</a>	6	M(8), T(8), W(8), R(8), F(8)
<input type="checkbox"/> <a href="#">Period 7</a>	7	M(L8), M(9), T(9), W(9), R(9), F(9)
<input type="checkbox"/> <a href="#">Period 8</a>	8	M(10), T(10), W(10), R(10), F(10)

To add a meeting pattern, from the Actions menu, select Add Meeting Pattern

- 4 On the Scheduling page, click Course Offerings and Meeting Patterns.
- 5 Select the lunch class and, from the Actions menu, select Edit Course Offerings.
- 6 In the Scheduling Group section, click on the row containing the scheduling group you want to work with. The available meeting patterns are listed in the Meeting Patterns section.
- 7 Select the following meeting patterns and move them to Selected Patterns:
  - Period 5a Lunch
  - Period 5b Lunch

- Period 5c Lunch

Lunch [Copy](#)

Offerings ^

Scheduling Group	Term Set	Default Offering	Allowed Offering	Meeting Patterns
<a href="#">Freshman &amp; Sophomore</a>	<a href="#">Semesters</a>	<input type="radio"/>	<input checked="" type="checkbox"/>	6
<a href="#">Junior &amp; Senior</a>	<a href="#">Semesters</a>	<input checked="" type="radio"/>	<input type="checkbox"/>	3

Select a default offering to make the course available for scheduling (deselect the default to remove the course from scheduling). This will determine the term set used for classes when they are initially created. Select allowed offerings to allow users to schedule classes manually to different term sets.

Meeting Patterns ^

Selected scheduling group/term set: Junior & Senior /Semesters

Available patterns:

- Period 1
- Period 2
- Period 3
- Period 4
- Period 5a Lunch
- Period 5b from 5aC
- Period 5b from 5aL
- Period 5c Class
- Period 6
- Period 7

Selected patterns:

- Period 5c Lunch
- Period 5a Class
- Period 5b Lunch

Buttons: ->, <-, All ->, <- All

To see the available meeting patterns, click in a scheduling group row without clicking on a link.

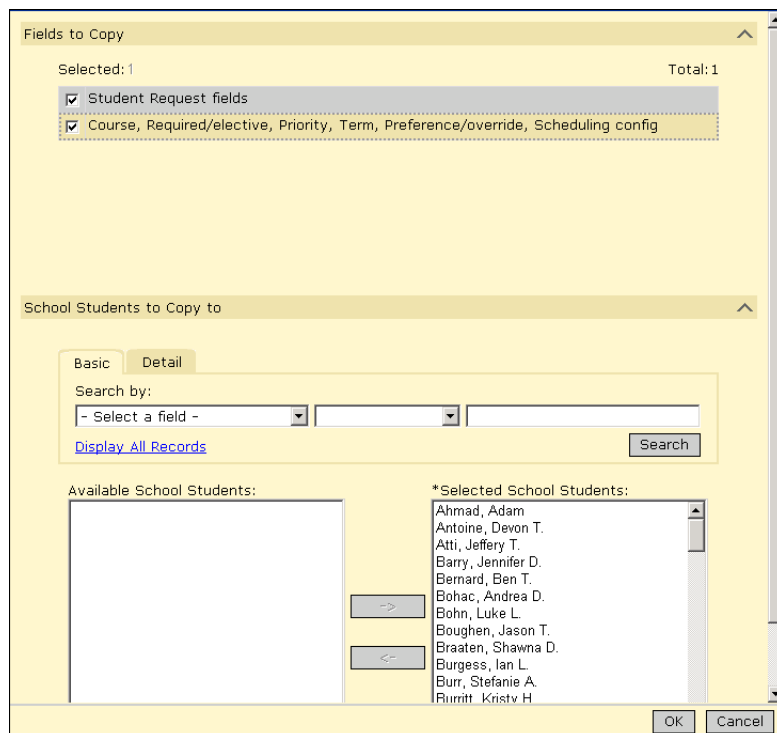
- 8 Click Save.

### To add lunch to student schedules:

- 1 Log on as a school administrator.
- 2 Search for students who require lunch and, from the search results, select all students you want to assign a lunch.
- 3 From the Actions menu, select Open Student > Schedule.
- 4 On the Student Schedule page, click the Course Request tab.
- 5 In the Course # field, enter the course number for the lunch course and click Add.
- 6 In the Course Request list, select the lunch course, and then from the Actions menu, click Copy Fields > Course Requests.
- 7 In the Fields to Copy section, select Student Course Requests and, in the School Students to Copy to section, select all the students who require lunch and move them to the Selected School Students list. Click OK.

**NOTE**

When you select the students to copy the course requests to, make sure you do not select the student you are copying course requests from, or that student will have duplicate course requests.



- 8 Click Home.
- 9 In the Control bar, click Scheduling.
- 10 On the Scheduling page, click Load Students.
- 11 On the Load Students page, search for and select the students whose schedules you want to load, and then from the Actions menu, click Load Students.
- 12 Click OK.

## Creating and Scheduling Study Hall Periods

You can assign study halls by creating a study hall course and assigning as many study hall requests as are required to fill the students' schedules. You can also create multiple study hall courses; for example, you can create separate study hall classes for grade 9, grade 10, and grade 11 students.

If meeting patterns don't overlap and empty periods always coincide with a class schedule, you can assign existing class meeting patterns to study halls. However, if class meeting patterns overlap, students could have an empty period anywhere in their schedule. In that case, you need to create separate meeting patterns for study halls to accommodate all possible empty periods. When you plan your study hall meeting patterns, consider all the possibilities for an empty period to occur in student schedules and create a meeting pattern for every possibility.

**Tips:**

- To ensure that a study hall is not scheduled in place of required courses, either set the study hall as “elective” and the required courses as “required” or set the priority for study hall classes to be less than the priority for required classes.
- If you are scheduling study halls using the Walk-in Scheduler or Student Loader, you can lock classes already scheduled to prevent the Student Loader from changing the classes that are already set. You can only lock classes for individual students.

**Setting Up Study Halls to Replace Empty Periods - Example**

Filling a student’s empty periods with study halls involves three overall steps:

- Create a study hall class. For more information, see “Step 1: Create a Study Hall Class” on page 303.
- Create and assign meeting patterns to study halls. For more information, see “Step 2: Create and Assign Study Hall Meeting Patterns” on page 304.
- Assign the study hall to students. For more information, see “Step 3: Assign Study Hall Classes To Students” on page 304.

**Step 1: Create a Study Hall Class**

- 1 The district administrator must create a study hall course with the following settings and assign it to your school:

Course Detail page:

- Course number = any suitable course number, e.g., 2000
- Course name = any suitable name, e.g., Study Hall
- Course short name = any suitable short name, e.g., SH
- Course subject area = any subject area, e.g., NA
- Course type = any suitable course type, e.g., Non-academic
- Course is = study hall

Course Scheduling page:

- Scheduling load = suitable load, e.g., 0.5 for a single semester course or 1.0 for a full year course.
- Maximum students = if creating a free-form study hall, allow a large group. The maximum number allowed is 999.
- Minimum students = enter a low number to allow any number of students to be assigned the study hall, e.g., 1.
- Optimal students = 20

Course Grading page:

- Grading does not apply to study hall courses.

- 2 At the school, if you are using Master Schedule Builder to assign rooms to classes, set up study hall rooms.
- 3 Create meeting patterns for every study hall meeting arrangement. You need a meeting pattern for every possible study hall scenario

## **Step 2: Create and Assign Study Hall Meeting Patterns**

You need to assign a meeting pattern for each time slot in which the study hall is offered. If empty periods always coincide with class meeting patterns, you can assign the same meeting pattern to study halls as other classes. If an empty period could occur anywhere in a student's schedule and does not always match class meeting patterns, you can create meeting patterns specifically for study halls.

### **To assign class meeting patterns to study halls:**

- 1** Log on as a school administrator.
- 2** On the Scheduling page, click Course Offerings and Meeting Patterns.
- 3** Select the study hall class and, from the Actions menu, select Edit Course Offerings.
- 4** In the Scheduling Group section, click on the row containing the scheduling group you want to work with. The available meeting patterns are listed in the Meeting Patterns section.
- 5** Select all the study hall meeting patterns and move them to Select Patterns. Click OK.

### **To create study hall meeting patterns and assign them to study halls:**

- 1** Log on as a school administrator.
- 2** On the Scheduling page, click Meeting Patterns.
- 3** From the Meeting Patterns for Scheduling Group dropdown, select the scheduling group.
- 4** From the Actions menu, click Add Meeting Pattern and enter the required meeting patterns. For example, create a meeting pattern for every period in every day.
- 5** On the Scheduling page, click Course Offerings and Meeting Patterns.
- 6** Select the study hall class and, from the Actions menu, select Edit Course Offerings.
- 7** In the Scheduling Group section, click on the row containing the scheduling group you want to work with. The available meeting patterns are listed in the Meeting Patterns section.
- 8** Select all the study hall meeting patterns and move them to Select Patterns. Click OK.

## **Step 3: Assign Study Hall Classes To Students**

If you want to fill the empty periods of a student's schedule with study halls, load the student's required and elective course requests first. When you are happy with the student's schedule, add enough course requests to fill in their schedule, and load students again. For information about determining the number of study hall classes required to fill a student's schedule, see "Determining the Number of Study Hall Classes Required" on page 305.

### **To assign study hall classes to students:**

- 1** Log on as a school administrator.
- 2** Open a student record.
- 3** In the control bar, click Schedule.
- 4** Enter course # for as many study hall courses as required to fill the student's schedule.
- 5** If you are working in the active calendar, set the date you want the changes to take effect.
- 6** Click New Schedule.

The student's schedule is generated and empty periods are filled with study halls.



## Determining the Number of Study Hall Classes Required

You can use the Scheduled Load or Filled Scheduling Load fields to determine the number of study halls required to fill a student's schedule.

The Scheduled Load and Filled Scheduling Load fields show the sum of the scheduling load values for all the courses in the student's current schedule. If the value is less than a full load, you can add study halls to fill the student's schedule. For example, if a full course load is "8" and the study hall is assigned a scheduling load of "1" then any students who have a filled scheduling load of "7" require one study hall to fill their schedule.

You can check the Filled Scheduling Load value for individual students on the Student Scheduling page or you can sort students by Scheduled Load on the Student Loader page. From the Student Loader page, you can also save a list of students that require the same number of study halls to fill their schedules and then assign the study hall requests to all the students in the saved list at one time.

### To display the filled scheduling load for individual students:

- 1 Log on as a school administrator.
- 2 Open a student record.
- 3 In the control bar, click Schedule.

The student's schedule shows the student's filled scheduling load.

Chancery SMS™ Quick Search > Student Search Results > Student Schedule

Actions Edit Reports Help | Home | Log off |

Mullaly, Jeffrey J 900001544 Gr-10 Male Jul 8, 1988

View: Semester 1

Selected: 0 Total: 7

<input type="checkbox"/>	Term	Meeting Pattern	Class Name	Teacher	Room	Details	Lock
<input type="checkbox"/>	S1	MTWRF - 1	<a href="#">Physical Science-1</a>	Patel, Kiran	Science A		<input checked="" type="checkbox"/>
<input type="checkbox"/>	S1	MTWRF - 2	<a href="#">Drawing &amp; Painting I-1</a>	Marshall, Tammy	Art		<input checked="" type="checkbox"/>
<input type="checkbox"/>	S1*	MTWRF - 3L	<a href="#">Chemistry-4</a>	Christos, Maria	Chemistry		<input checked="" type="checkbox"/>
<input type="checkbox"/>	S1	MTWRF - 4L	<a href="#">Political Geography-1</a>	James, Jerry	209		<input checked="" type="checkbox"/>
<input type="checkbox"/>	S1	MTWRF - 5	<a href="#">Algebra I-2</a>	Apostel, Gabrielle	210		<input checked="" type="checkbox"/>
<input type="checkbox"/>	S1	MTWRF - 6	<a href="#">North American History-1</a>	Taylor, Shay	205		<input checked="" type="checkbox"/>
<input type="checkbox"/>	S1*	MTWRF - 8	<a href="#">French I-1</a>	Hennigs, Joachim	202		<input checked="" type="checkbox"/>

### To sort students by scheduled load:

- 1 Log on as a school administrator.
- 2 In the control bar, click Scheduling.
- 3 On the Scheduling page, click Load Students.
- 4 Search for student records.

OR

Click Display All Records.

5 Click Scheduled Load to sort students by their filled scheduling load.

The screenshot shows the 'Chancery SMS' interface for 'Load Students'. The left sidebar contains navigation menus for STUDENT, CLASS, SCHOOL, and ADMIN. The main area displays a table of student scheduling data. The 'Scheduled Load' column header is circled, and an arrow points to it from a text box on the right that reads 'Click the heading to sort the column'. The table includes columns for Name, Gr, HR, Age, Requested Load, Scheduled Load, and Student Seat Count.

<input type="checkbox"/>	Name	Gr	HR	Age	Requested Load	Scheduled Load	Student Seat Count
<input type="checkbox"/>	<a href="#">Burr, Stefanie A</a>	11	11-B	17	2.0	2.0	1
<input type="checkbox"/>	<a href="#">Crosman, Sarah A</a>	11	11-B	17	2.0	2.0	1
<input type="checkbox"/>	<a href="#">Kronebusch, Shayla A</a>	11	11-A	17	2.0	2.0	1
<input type="checkbox"/>	<a href="#">Mongeon, Alan G</a>	10	10-B	15	3.0	2.0	1
<input type="checkbox"/>	<a href="#">Pankratz, Mike S</a>	11	11-B	17	2.0	2.0	1
<input type="checkbox"/>	<a href="#">Chambers, Justin L</a>	9	9-A	14	2.7	2.1	1
<input type="checkbox"/>	<a href="#">Atti, Jeffery T</a>	9	9-B	15	2.5	2.5	1
<input type="checkbox"/>	<a href="#">Charlie, Jeston T</a>	9	9-B	15	2.5	2.5	1
<input type="checkbox"/>	<a href="#">Connal, Alan G</a>	10	10-A	15	2.5	2.5	1

# Loading Student Schedules

After you have scheduled courses, teachers, and rooms into the master schedule for your school, you can define Student Loader options and use the Student Loader to automatically load student schedules.

If constraints are applied to a class, the constraints are taken into consideration when students are scheduled using automated schedule processes such as the Student Loader. If you manually assign students to classes and the student does not fit the criteria, Chancery SMS displays an error message. If you have permission to override constraints, you can assign students to classes even if they do not fit the constraint criteria. For more information about constraints, see “Setting Up Constraints” on page 197.

Before you can use the Student Loader to create student schedules, make sure all student course requests are entered. For more information about entering student course requests, see “Working with Course and Alternate Requests” on page 247.

## NOTE

In the active calendar, you cannot use the Student Loader to generate student schedules if grades or attendance have already been collected, or if a future-dated transfer has been entered for any student in any class. If the Student Loader is unavailable for creating student schedules, you can still create student schedules on the Student Schedule page. For more information about using the Student Schedule page, see “Working with Student Schedules” on page 321.

## Setting Student Loader Options

Student loader options are used by both the Student Loader and the Walk-in Scheduler. You can set the Student Loader options in either the planning or active calendar. However, once you enter student grades or attendance, you cannot run the Student Loader. You can continue to use the Walk-in Scheduler.

### To set Student Loader options:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 If you are using the planning calendar, on the Scheduling page, from the Planning Schedule dropdown, choose the planning schedule you want to work with.

The messages to the right of the links summarize what is set up for this planning schedule.

- 4 If you are using a planning calendar, on the Scheduling page, under Step 7, click Student Loader Options.

OR

If you are using an active calendar, on the Scheduling page, under Step 8, click Student Loader Options.

The Student Loader Options page opens.

5 On the Student Loader Options page, enter the following information:

Field	Description
Class Overfill %	Specify a percentage between 0 and 100. Allows the class capacity to be exceeded by this percentage. You can use this option temporarily in a test run of the Student Loader to see where the “spikes” are, which shows you which courses need extra classes. You can also use this setting to allow extra room in classes.
If a Student Has More Than <i>n</i> Unscheduled Requests, Do Not Schedule At All	Specify a number between 1 and 99. If the Student Loader is unable to find a schedule for a student that falls within this limit, it leaves the student completely unscheduled. Adjusting this number allows you to minimize the number of students left with partial schedules after a run of the Student Loader.
Attempt to Re-schedule Students to Avoid Conflicts Caused by Full Classes	This option tries to make room in full classes by shuffling students. The Student Loader tries to re-schedule students with a lower scheduling difficulty in order to schedule students who are more difficult to schedule. For an example of using this option, see “Example: Attempting to Re-Schedule Students to Avoid Conflicts From Full Classes” on page 310.

Field	Description
Attempt to Schedule an Equal Number of Students to Each Class Choice for Each Course	<p>When classes reach 50% of their average class size, the Student Loader progressively opens the unused 50% to keep classes as level as possible.</p> <p><b>NOTE</b> Selecting this option does not guarantee that each class will have an equal number of students. The numbers of students assigned to each class is also affected by class capacities. In addition, conflicts in the Master Schedule could prevent an equal distribution of students across the specified classes. For additional information about balancing class sizes, see the Chancery SMS Master Scheduling Best Practices Guide.</p>
Use Alternates	<p>Schedules a student's alternate course requests to find a schedule.</p> <p>You might want to make early runs of the Student Loader without using alternates. Then turn this option on in later runs to get more flexibility to schedule students who are more difficult.</p>
Weighted Options	<p>Use weighted options to specify which factor has priority when loading students.</p> <p>Move weighted options so they are in order of priority. The Student Loader schedules according to the order of the selected weighted options.</p> <p>By default, the following weighted options are selected in the following order:</p> <ol style="list-style-type: none"> <li><b>1</b> Load balancing rules</li> <li><b>2</b> Class sequencing rules</li> <li><b>3</b> Class attribute rules</li> <li><b>4</b> Term preferences</li> </ol> <p>Use capacity balancing constraints and use restriction constraints are not selected by default.</p>
Use capacity balancing constraints	<p>This option instructs the Student Loader to consider the capacity balancing constraints that have been assigned to classes when creating student schedules.</p> <p>For more information about capacity balancing constraints, see "Creating and Editing Capacity Balancing Constraints" on page 202.</p>
Use class load balancing rules	<p>This option instructs the Student Loader to try to find a schedule that balances the student's classes covered by class load balancing rules between terms.</p> <p>For more information about class load balancing rules, see "Defining Course Load Balancing Rules" on page 217.</p>
Use class sequencing rules	<p>This option instructs the Student Loader to try to find a schedule that sequences classes between terms or periods for the student's classes covered by class sequencing rules.</p> <p>For more information about class sequencing rules, see "Defining Course Sequencing Rules" on page 214.</p>

Field	Description
Use class attribute rules	This option instructs the Student Loader to try to find a schedule that has classes with the same or different attributes in any of the student's classes covered by class attribute rules. For more information about class attribute rules, see "Defining Same/Different Attribute Rules" on page 215.
Use restriction constraints	This option instructs the Student Loader to consider the restriction constraints that have been assigned to classes when creating student schedules. For more information about restriction constraints, see "Creating and Editing Restriction Constraints" on page 198.
Use term preferences	This option instructs the Student Loader to consider the term preferences that might have been entered for a student's course requests when finding a schedule for a student.

6 Click OK.

### Example: Attempting to Re-Schedule Students to Avoid Conflicts From Full Classes

The Algebra class in period 1 is full, while the Algebra class in period 2 is not full. English AP is a singleton course that meets only in period 2. Joe is requesting both Algebra and English AP, but he cannot get both courses because the only Algebra class that has room is also in period 2.

If you selected the "Attempt to re-schedule students to avoid conflicts caused by full classes" option, the Student Loader un-schedules one of the students – let's say Adam – in the period 1 Algebra class who is easier to schedule, and schedules Joe into the period 1 Algebra class and the period 2 English AP class.

The Student Loader then rebuilds Adam's schedule, un-scheduling and re-scheduling his classes until Adam gets all his course requests.

Using this option results in more students getting all their course requests. If you do not use this option, Joe would not be able to take both Algebra and English AP.

When you load students, because you are only loading the students you select, this option only affects selected students. As always, the Student Loader does not change locked students.

## Using the Student Loader to Create Student Schedules

The Student Loader automatically generates student schedules based on student course requests, student loader options, and applied class constraints. For more information about entering course requests, see "Working with Course and Alternate Requests" on page 247. If you want to manually assign classes to students, you can assign classes to individual students from the Student Schedule page or you can assign classes to multiple students from the Class Roster page or Student Search page.

- For information about assigning classes from student schedules, see "Manually Adding, Dropping, or Transferring Classes" on page 329.

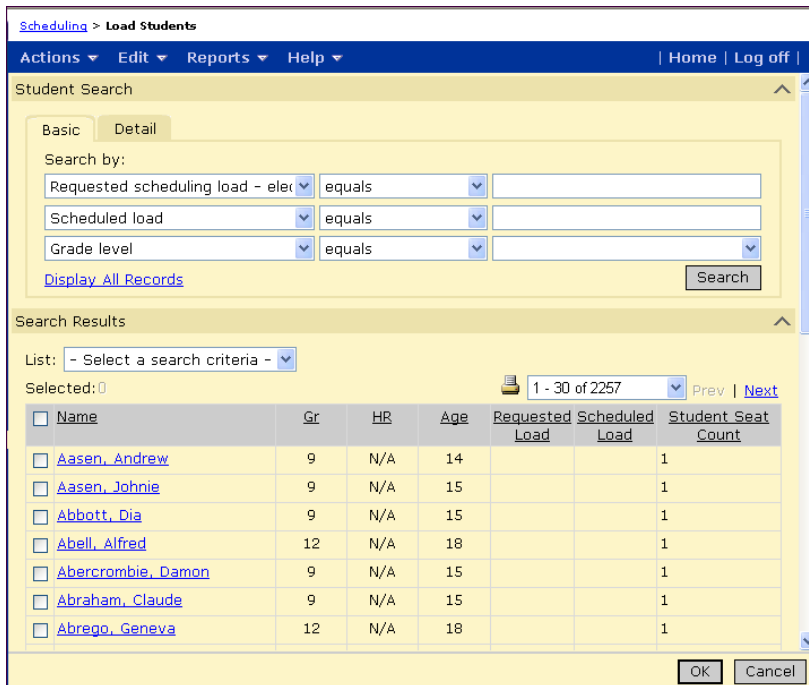
- For information about assigning classes from a class roster, see “Adding Groups of Students to Other Classes” on page 353 and “Assigning Groups of Students to Classes” on page 354.
- For information about assigning classes from student search results, see “Changing Class Assignments for Multiple Students” on page 242.

**NOTE**

In the active calendar, you cannot use the Student Loader to generate student schedules if grades or attendance have already been collected, or if a future-dated transfer has been entered for any student in any class. If the Student Loader is unavailable for creating student schedules, you can still create student schedules on the Student Schedule page. For more information about using the Student Schedule page, see “Working with Student Schedules” on page 321.

**To use Student Loader to generate student schedules:**

- 1 Log on as a school administrator.
- 2 Make sure you are using the planning calendar.  
For information about switching to a planning calendar, see “Switching to the School Planning Calendar” on page 9.
- 3 In the control bar, under Admin, click Scheduling.
- 4 On the Scheduling page, from the Planning Schedule dropdown, select the planning schedule you want to work with.
- 5 On the Scheduling page, under Step 7, click Load Students.  
The Load Students page opens.



- 6** On the Load Students page, search for the students you want to work with. For more information about searching for students, see “Working With Student Records” on page 10.

You can use the Student Search section on this page to search for:

- students with requests but no schedules (e.g., new students)
- students whose requests or schedules have been changed
- students that have been affected by master schedule changes (e.g., if a class was moved)
- students by Seat Count value

Field	Description
List	The working lists of your recent searches.
Name, Grade, Homeroom, and Age	Basic student information. Use Edit > Choose Columns to select the fields you want to view.
Requested Load	The sum of the scheduling load of all the student’s primary course requests.
Scheduled Load	The sum of the scheduling load of classes on the student’s schedule.
Student Seat Count	A weighting number for students who are counted as having a value greater than 1 in the class. For example, special needs students who require more of the teacher’s time might have a seat count value of 1.5 or 2.

- 7** Select the students you want to load then, from the Actions menu, click Load Students.
- 8** If necessary, adjust Student Loader options, and load students again.
- 9** Repeat Steps 6 to 8 to continue loading students. When you’re done, click OK.



# Setting Up Resource Services (active calendar only)

## NOTE

This step is only available in the active calendar.

In addition to regular courses, you can set up resource services. For example, you can set up resource services for Remedial Reading and Math, Speech Therapy, Gifted and Talented Enrichment, and so on.

Resource services are typically taught by a resource teacher (who often moves between several schools). The resource service is usually taught in a small group or on an individual basis, either in a "pull-out" format where students are moved to another room for the class, or in an "inclusion" format where students are taught the resource service in the regular classroom.

You do not have to create classes for resource services. You can specify when each student receives a service, and whether it is given in an inclusion or in a pull-out format.

## NOTE

**For Tennessee customers only:** Resource services are not displayed on the District Setup > Schools > Classes page. As a result, resource services are not reported to EIS. To include special education classes in EIS reports, do not set up special education classes as resource services. Create a subject and schedule a class, as you would with regular classes.

## Creating Resource Services

You can set up resource services only in the active calendar.

### To create a resource service:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 7, click Resource Services.
- 4 On the Resource Services page, do one of the following:

To	Do this
Add a resource service	<ul style="list-style-type: none"><li>• From the Actions menu, click Add Resource Service.</li></ul>
Edit a resource service	<ul style="list-style-type: none"><li>• Click the name of the resource service you want to change. OR To change multiple resource services, select the resource services you want to change. From the Actions menu, click Edit Selected Resource Services.</li></ul>
Delete a resource service	<p>You cannot delete a resource service if it has been assigned to a student, even if the resource assignment has ended. Before deleting a resource service, you must delete all record of assignments of that resource service.</p> <ol style="list-style-type: none"><li>1 Select the resource service you want to delete.</li><li>2 From the Actions menu, click Delete Resource Service.</li><li>3 To confirm, click OK.</li></ol>

If you add or edit a resource service, the Add Resource Service or Edit Resource Service page opens.

5 On the Add Resource Service page, enter the necessary information.

Field	Description
Resource Service Name	Enter a resource service name, such as Reading Recovery.
Short Name	Enter a short name.
Service Number	Enter the resource service number.
Related Subject	Select a subject or subject element.
Default Teacher	If necessary, select the default teacher for this resource service.

6 Click OK.

## Assigning Resource Services to Students

You can only assign resource services in the active calendar.

After resource services are set up, you can schedule students to receive the resource service. For more information about setting up resource services, see “Creating Resource Services” on page 313.

You can also schedule resource services for individual students from the Student Schedule page. For more information, see “Adding and Deleting Resource Assignments” on page 345.

### To schedule resource assignments:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 7, click Resource Roster.

**4** On the Resource Roster page, from the View dropdown, select one of the following options:

- a specific resource service
- a specific resource assignment
- all resource assignments

To display students who have received resource services in the past or are scheduled to receive resource services in the future, but who are not currently receiving resource services, from the Edit menu, click Show Incoming Students or Show Past Students.

**5** Do one of the following:

To	Do this
Add a resource assignment	<ul style="list-style-type: none"> <li>• From the Actions menu, click Add Resource Assignment.</li> </ul>
Edit a resource assignment	<ul style="list-style-type: none"> <li>• Click the name of the resource assignment you want to edit. OR Select the resource assignment you want to edit. From the Actions menu, click Edit Resources Assignment.</li> </ul>
Delete a resource assignment	<ol style="list-style-type: none"> <li><b>1</b> Select the resource assignment you want to delete.</li> <li><b>2</b> From the Actions menu, click Delete Resource Assignment.</li> <li><b>3</b> Click OK and skip the remaining steps.</li> </ol>

When you add or edit a resource assignment, the Add Resource Assignment or Edit Resource Assignment page opens.

The screenshot shows a web browser window with the following elements:

- Navigation bar: [Scheduling](#) > [Resource Roster](#) > [Add Resource Assignment](#)
- Actions menu: Actions | Help | Home | Log off
- \*Student name: [Text input] [Select student...](#)
- \*Resource service: [None] (dropdown)
- Related subject: [None] (dropdown)
- Comment: [Text area]
- Scheduling section:
  - Text: "If the way a service is delivered to a student changes during the school year, you can add another resource assignment for the student with a different date range."
  - \*Start: [mm/dd/yyyy] (calendar icon)
  - End: [ ] (calendar icon) leave blank for the end of school year
  - Instructional model:
    - Inclusion in regular classroom
    - Pulled out to room: [ ]
  - Text: "Select up to 3 teachers, in any order."
  - \*Teacher: [None] (dropdown)
- \*Required label at the bottom left.
- OK and Cancel buttons at the bottom right.

- 6 On the Add Resource Assignment or Edit Resource Assignment page, enter or edit the necessary information.

Field	Description
Student Name	Click Select Student to search for and select a student.
Resource Service	Select a resource service. After you save this record, this field becomes view-only.
Related Subject	Shows any related subjects defined for the resource service.
Comment	Enter a comment of up to 500 characters, such as the reason the student is in this resource service.
Start and End date	Enter the dates that the resource assignment will start and end. If a student's resource schedule changes during the year, you can duplicate the student's resource assignment and change the scheduling information.
Instructional Model	Select whether this resource service is taught in the regular classroom, or if it is taught in another room. If it is taught in a different room, specify the room.
Teacher	Select up to three teachers for the resource assignment.
Minutes Per Week	Enter the number of minutes this student receives this resource service each week.
Meeting Times	Enter the time that the student and teacher will meet for the resource assignment.

- 7 Click OK.

To keep track of resource assignment changes, or to copy the same resource information to multiple students, see "Tracking Resource Assignment Changes" on page 316.

## Tracking Resource Assignment Changes

The schedule of a student's resource assignments might change during the school year. For example, the amount of time they receive the resource service might increase from 120 minutes to 180 minutes each week beginning on November 1. You might need to track both the old and new schedules. You can change the student's resource assignment end date to October 31, duplicate the resource assignment, and change its start date to November 1 and its minutes per week to 180.

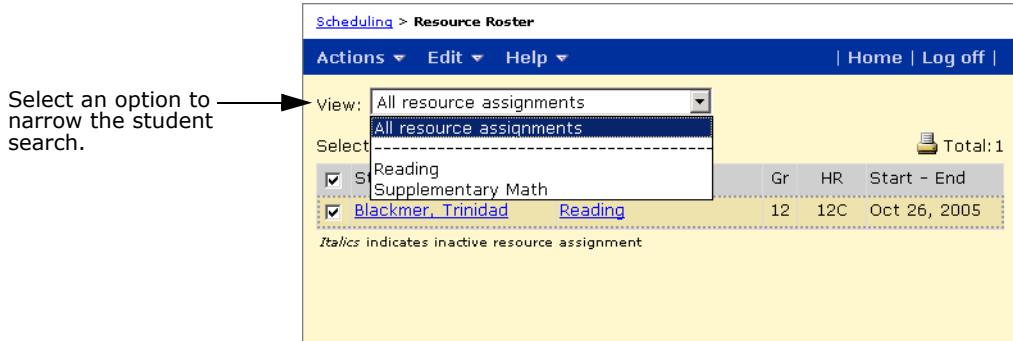
When several students take the same resource service together, duplicate the resource assignment and change the student information.

### To duplicate a resource assignment:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 6, click Resource Roster.

- On the Resource Roster page, select the student whose resource assignment you want to duplicate.

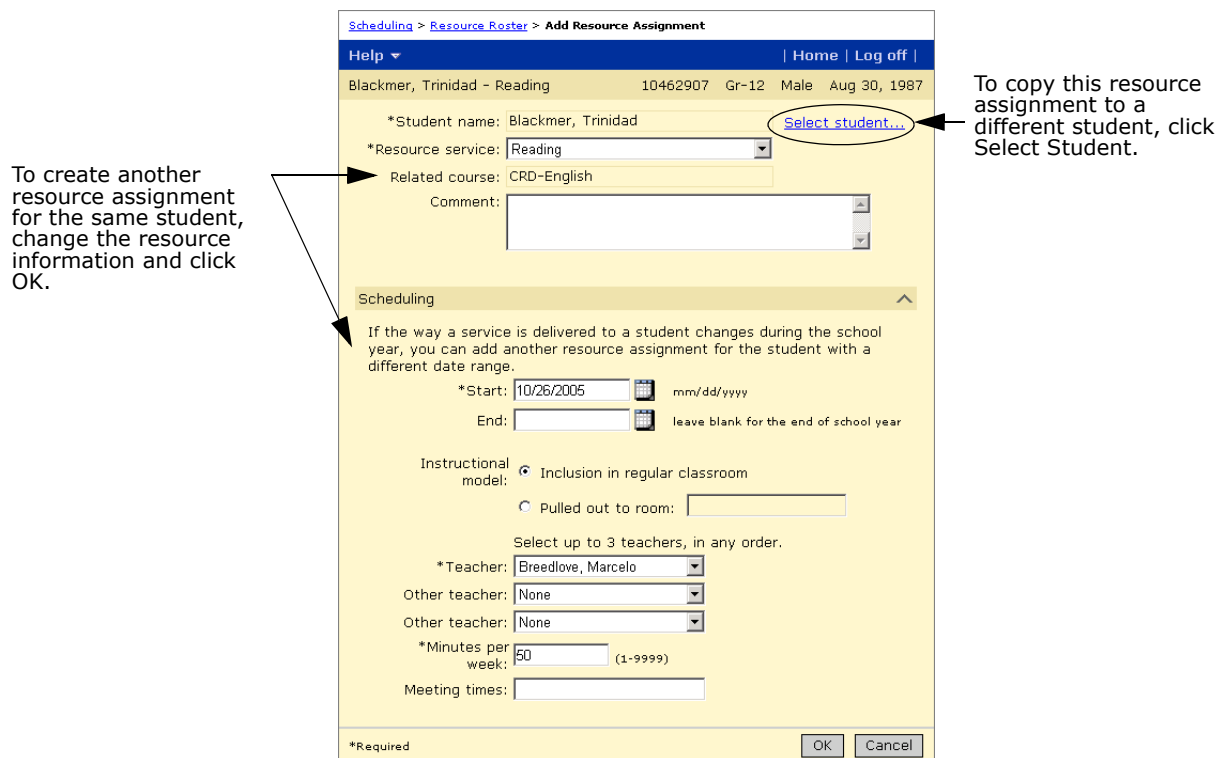
If necessary, from the View dropdown, select an option to narrow the list of students.



- From the Actions menu, click Copy Resource Assignment.
- To assign the resource service to another student, on the Add Resource Assignment page, click Select Student beside the student name. In the Select Student dialog, choose another student and click OK.

OR

To change resource information for the same student, change the roster information such as the resource service, start and end dates, minutes per week, or the meeting time.



- Click OK.



# Selecting a Planning Schedule (planning calendar only)

When you have finished scheduling in the planning calendar and are ready for Year-End Processing (YEP), you must select the planning schedule you want to roll over to the active calendar when YEP is run.

## To select a planning schedule for the active calendar:

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click Scheduling.
- 3 On the Scheduling page, under Step 2, select the planning schedule you want to become active when YEP is run.
- 4 On the Scheduling page, under Step 8, click Select Current.

The screenshot shows the Scheduling page with a navigation bar (Actions, Reports, Help) and a 'Suggested steps for scheduling setup' section. The steps are as follows:

- Step 1:** Configure scheduling aspects of rooms, staff & courses. Includes links for Room Setup (36 rooms), Staff Setup (135 teachers), and Course Setup (0 courses assigned to school).
- Step 2:** Create one or more planning schedules. A dropdown menu shows 'Planning Schedule: 2006-2007' with 'Prev', 'Next', and 'New' options.
- Step 3:** Set up the schedule structure. Includes links for Scheduling Groups (0 groups), Scheduling Term Sets (0 term sets), Day Pattern (5 regular and 0 special days), Bell Schedules (0 bell schedules), and Meeting Patterns (0 meeting patterns).
- Step 4:** Configure student loading rules. Includes links for Constraints (0 class constraints), Class Loading Rules (0 class rules), and Team Loading Rules (0 teams).
- Step 5:** Configure terms & meeting patterns for courses. Includes link for Course Offerings & Meeting Patterns (0/0 courses with offerings configured).
- Step 6:** Create the school's master schedule. Includes links for Class Scheduling Options (Over-allocation 0%), Course Request Tally (0/0 students with requests), Teacher Allocations (0/135 teachers allocated), and Master Schedule (0/0 classes scheduled).
- Step 7:** Load student schedules. Includes links for Student Loader Options (Class overfill 0%; unscheduled request limit: 2) and Load Students (0/0 students with full schedules).
- Step 8:** Select one planning schedule to become active when YEP is run. A 'Select Current' button is visible, with the text 'No planning schedule selected' below it.





# Working with Student Schedules

The Student Schedule page allows you to view and adjust individual student schedules. From this page, you can also assign student course requests, manually assign classes, or automatically generate a new schedule for individual students.

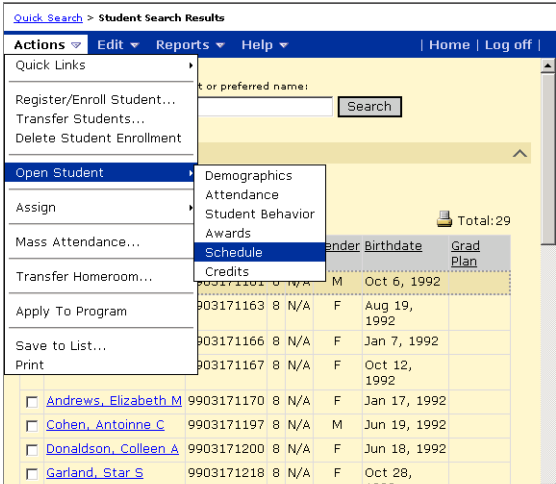
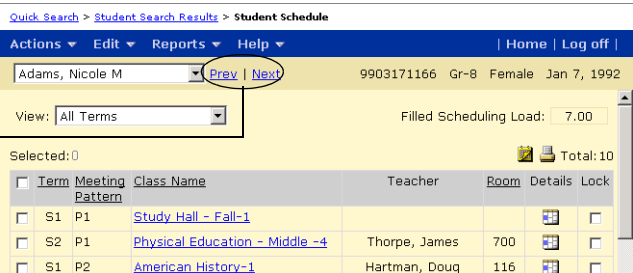
## Opening Student Schedules

You can use the Student Schedule page to view and adjust individual student schedules. From this page, you can also assign student course requests, manually assign classes, or use the Walk-in Scheduler to automatically generate a new schedule for individual students after school has started.

You can open student schedules for individual students from the Student Demographics page, or you can go directly to the student schedule for one or more students from any student search results page.

**NOTE**

The Open Student>Schedules option on the Student Search Results page offers a quick way to open student schedules and allows you to open multiple student schedules at one time.



Task	Procedure
Opening Student Schedules From Student Search Results	<ol style="list-style-type: none"> <li>1 Log on as a school administrator.</li> <li>2 Search for a student.</li> <li>3 From the Student Search Results, select the students whose schedules you want to view.</li> <li>4 From the Actions menu, click Open Student&gt;Schedule.</li> </ol>  <ol style="list-style-type: none"> <li>5 If you selected more than one student, on the Student Schedule page, click Prev and Next to page through the open student schedules.</li> </ol> 

## Understanding the Student Schedule Page

This section provides an overview of the Student Schedule page. For detailed procedures on using the Student Schedule page, see “Entering Course and Alternate Requests for Individual Students” on page 247 and “Manually Adding, Dropping, or Transferring Classes” on page 329.

When you are familiar with scheduling students, you can use the brief procedures as a quick reference when you schedule walk-in students or change a student’s schedule.

For information about working with student records, see “Working With Student Records” on page 10.

Click  to view the student’s schedule and click  to print the student’s schedule.

Show the student’s current scheduling load.

Current student schedule, which is initially blank.

In the active calendar, click the Changes Effective date to specify when you want the changes to the student’s schedule to take effect.






If available, from the Change Reason dropdown, select the reason the student’s schedule is being changed.

Click the Course Request tab to work with student course requests or click the Class Search tab to work with classes.



The student’s schedule shows the following information:

Field	Description
View	Select the term whose schedule you want to view. When you select All Terms, this page displays all the student’s classes for the entire school year. You can select individual terms to view the student’s classes for that term only. For full details about changes made to the student’s schedule, from the Actions menu, click View Change History.
Filled Scheduling Load	The total scheduling load in the student’s current schedule.

Field	Description
Show Reservation Labels	By default, the student’s schedule includes any reserved periods assigned to the student. If you don’t want to see reservation labels in the list of classes, clear this checkbox. For more information about reservation labels, see “Reserving Periods in Student, Teacher, or Room Schedules” on page 149.
Term	The term that the course is scheduled.
Meeting Pattern	The meeting pattern defined for the class.
Class Name	The class in the student’s schedule. Click the class name to open the Class Roster page. For more information about class rosters, see “Working with Homeroom and Class Rosters” on page 349.
Teacher	The teacher scheduled to teach the class.
Room	The room scheduled for the class.
Details	Click the icon to view details about the class (the course name and number and the class name and code).
Lock	Lock the line to prevent any automatic process from changing it, such as clicking New Schedule. You can manually change locked items.
Changes Effective	This field is only displayed in the active calendar. Specify the effective date for the schedule changes. Default is today. Click the link to change the date. For more information, see “Specifying Effective Dates for Schedule Changes” on page 328.
Change Reason	Applies to active calendar only. If you are working in the active calendar, the Change Reason dropdown appears if the district set up change reason codes. Change reasons may be required or optional. Select the reason the student’s schedule is being changed. If entered, the change reason is displayed on the Change History page for all manual changes to student schedules.
<b>Course Request tab</b>	
New Schedule	Create a new schedule for the student based on the course requests entered for the student and the scheduling rules and options defined in for the student loader. Each time you click New Schedule, the Student Loader creates a new version of the student’s schedule. For more information, see “Scheduling Walk-In Students” on page 328.
Bookmark	Available after you click the New Schedule button. Saves the current version of the student’s schedule and allows you to create other schedules. You can only bookmark one schedule. The next time you bookmark a schedule, any existing schedules are overwritten.
Return to Bookmark	Available after a schedule is bookmarked. Retrieve the last bookmarked schedule.

Field	Description
Course #	<p>Course Request section.</p> <p>Enter one or more course numbers that you want to add to the student's course requests.</p> <p>To add one course, enter the course number and press Enter or click Add.</p> <p>To add multiple courses, enter all the course numbers separated by commas then press Enter or click Add.</p>
Status	<p>Course Request section.</p> <p>Indicates the current status of the course request in the student's schedule.</p> <p>This column is blank until you run Master Schedule Builder or until you click Save after making manual changes.</p> <ul style="list-style-type: none"> <li> This request is scheduled, that is, there is a corresponding entry in the student schedule.</li> <li> This request is not scheduled because all classes for this course are full.</li> <li> This request is not scheduled because the only available classes for this course conflict with other courses on the student schedule.</li> <li> This request is not scheduled because there are no classes created for this course.</li> <li> An alternate for this request is scheduled. There is an entry in the student schedule for the alternate.</li> </ul>
Course Name	<p>Course Request section.</p> <p>The name of the course as defined at the district. Click the course name to open the Course Detail page.</p>
Course # (in table)	<p>Course Request section.</p> <p>The number of the course as defined at the district. Click the course name to open the Course Detail page.</p>
Term	<p>Course Request section.</p> <p>Indicates the term the student prefers for this course. The default is blank for no term preference.</p> <p>For each term of the allowed term sets for the course, the options are:</p> <ul style="list-style-type: none"> <li>• [O] – Term override. For example, if the request is for the second semester of a full year course.</li> <li>• [P] – Term preference. For example, if the preference is to take a one semester course in the first semester.</li> </ul>

<b>Field</b>	<b>Description</b>
Priority	<p>Course Request section.</p> <p>Specifies the order of importance for the course to be scheduled for the student.</p> <p>Enter a priority from 1 (highest) to 9999 (lowest). The default priority is 10 so you can give some courses a higher priority without having to change all the others. A blank priority is the same as 9999.</p> <p>Courses with the same priority are selected randomly.</p> <p>The priority is applied to required courses and electives separately, that is, you can have one set of priorities for required courses and another set for electives.</p> <p>The priority also determines which alternate course the Student Loader tries to schedule first.</p>
Required	<p>Course Request section.</p> <p>Specifies whether the course is required or an elective.</p> <p>The default value is set at the district. You can override the default for different students.</p> <p>Required courses have higher priority than electives and are scheduled first.</p> <p>The priority is applied to required courses and electives separately.</p>
Load Factor	<p>Course Request section.</p> <p>The scheduling load as defined at the district.</p> <p>The total load factor for the classes in the student's schedule is shown above the schedule grid.</p>
Requested Scheduling Load	<p>Course Request section.</p> <p>The total load factor for all requested required and elective courses.</p>
Alternate Course #	<p>Course Request section.</p> <p>Use this field to quickly enter one or more course numbers you want to add to the student's alternate course requests.</p> <p>To add one course, enter the course number and press Enter or click Add.</p> <p>To add multiple courses, enter all the course numbers separated by commas then press Enter or click Add.</p>
Alternate For	<p>Course Request section.</p> <p>Use this field to quickly enter one or more course numbers you want to add to the student's alternate course requests.</p> <p>To add one course, enter the course number and press Enter or click Add.</p> <p>To add multiple courses, enter all the course numbers separated by commas then press Enter or click Add.</p>

Field	Description
<b>Class Search tab</b>	
Add Class	To add the class to the student's schedule, select a class from the class search results and click this button. From more information, see "Manually Adding, Dropping, or Transferring Classes" on page 329.
Drop Class	To remove a class from the student's schedule, select a class in the student's schedule and click this button. From more information, see "Manually Adding, Dropping, or Transferring Classes" on page 329.
Transfer Class	To transfer the student to a different class, in the student's schedule, select the class you want to drop. From the class search results, select the class you want to add. Then click this button. From more information, see "Manually Adding, Dropping, or Transferring Classes" on page 329.
Status	Class section. Indicates whether the class is scheduled successfully. This column is blank until you run Master Schedule Builder or you click Save after making manual changes. It is also blank when the class is successfully scheduled.  This class is full, that is, it has reached its capacity. If you use overfill then this is capacity + overfill percentage.  This class conflicts with another class on the student schedule.
Term	Class section. The default is blank for no term preference. For each term of the allowed term sets for the course, the options are: <ul style="list-style-type: none"> <li>• [O] – Term override. For example, if the request is for the second semester of a full year course.</li> <li>• [P] – Term preference. For example, if the preference is to take a one semester course in the first semester.</li> </ul>
Meeting Pattern	Class section. The meeting pattern of the class.
Class Name	Class section. The name of the class.
Room	Class section. The room scheduled for that class.

## Specifying Effective Dates for Schedule Changes

After school starts, if you want to change student schedules or create a new schedule for students who do not have a schedule, you must specify the date you want the changes to take effect. The date you should select depends on whether the student is new to the school or is an existing student and on the task you are performing. The following table indicates the Changes Effective date you should select for various situations:

Student Type	Task	Changes Effective Setting
New	Generate a New Schedule	"First Day in School"
	Add/Drop/Transfer Class	"First Day in School"
Existing	Generate a New Schedule	"Today", "Tomorrow", or specify the date the change will take effect.
	Add/Drop classes in the current semester	"Today", "Tomorrow", or specify the date the change will take effect.
	Add/Drop classes for future semesters	"First Day in School"
	Transfer classes when both classes are in the current semester	"Today", "Tomorrow", or specify the date the change will take effect.
	Transfer classes when both classes are in a future semester	"First Day in School"

### NOTE

If you want to transfer classes when one class is in the current semester and one is in a future semester, you cannot use the transfer option. Use Add/Drop class instead.

## Scheduling Walk-In Students

Typically, student schedules are created in the planning calendar or early in the school year before grades and attendance are entered. Once grades and attendance are entered, you can no longer use the Student Loader to automatically create student schedules. If a student enrolls at your school partway into the school year, use the Walk-in Scheduler to automatically create a schedule based on student course requests.

Before you use the Walk-in Scheduler to create student schedules, enter course requests for the student. For more information about entering course requests, see "Working with Course and Alternate Requests" on page 247.

### To schedule walk-in students:

- 1 Log on as a school administrator.
- 2 Open a student schedule.

For more information about opening student schedules, see "Opening Student Schedules" on page 321.

- 3 Click New Schedule.



**4** Do one of the following:

To	Do this
Accept the generated schedule	<ul style="list-style-type: none"> <li>Click Save.</li> </ul>
Attempt to generate a different schedule	<ul style="list-style-type: none"> <li>Click New Schedule again.</li> </ul>
Store the generated schedule and attempt to generate a different schedule	<ul style="list-style-type: none"> <li>Click Bookmark and then click New Schedule again. You can only bookmark one schedule. Each time you click Bookmark, the current schedule overwrites the stored schedule.</li> </ul>
Return to a bookmarked schedule	<ul style="list-style-type: none"> <li>Click Return to Bookmark.</li> </ul>
Save some classes in the generated schedule and attempt to reschedule other classes	<ol style="list-style-type: none"> <li>For each class you want to save, in the Lock column, select the check box.</li> <li>When you have locked all the classes you want to save, click New Schedule again.</li> </ol>

## Manually Adding, Dropping, or Transferring Classes

On the Student Schedule page, you can adjust the student's schedule by manually adding, dropping, or transferring classes. If you adjust the student's schedule in the active calendar, you need to enter the date the change will take effect and you may be required to enter a reason for the change. For more information about setting the effective date, see "Specifying Effective Dates for Schedule Changes" on page 328.

### NOTE

If the class assignment changes result in any class exceeding their defined capacity, you must have the Classes - Exceed Capacity permission set to "Yes" to make the changes.

After transferring classes, you can transfer grades and reassign attendance to remove all record of the student ever being in the dropped class. For more information about transferring grades and attendance, see "Transferring Grades and Reassigning Attendance" on page 335.

### NOTE

You cannot drop or transfer from a class if attendance has been entered after the drop or transfer effective date.

### To adjust student schedules:

- Log on as a school administrator.
- Open a student schedule.

For more information about opening student schedules, see "Opening Student Schedules" on page 321.

**3** On the Student Schedule page, do one of the following:

To	Do this
Add a class to the student's schedule	<ol style="list-style-type: none"> <li><b>1</b> If required, click the Changes Effective date to specify the date you want the changes to take effect.</li> <li><b>2</b> If available, from the Change Reason dropdown, select the reason the student's schedule is being changed.</li> <li><b>3</b> Click the Classes tab.</li> <li><b>4</b> Search for and select the class you want to add.</li> <li><b>5</b> Click Add Class.</li> </ol>
Remove a class from the student's schedule	<ol style="list-style-type: none"> <li><b>1</b> If required, click the Changes Effective date to specify the date you want the changes to take effect.</li> <li><b>2</b> If available, from the Change Reason dropdown, select the reason the student's schedule is being changed.</li> <li><b>3</b> From the student's schedule, select the class you want to remove.</li> <li><b>4</b> Click Drop Class.</li> </ol>
Transfer the student from a class into a different class	<ol style="list-style-type: none"> <li><b>1</b> If required, click the Changes Effective date to specify the date you want the changes to take effect.</li> <li><b>2</b> If available, from the Change Reason dropdown, select the reason the student's schedule is being changed.</li> <li><b>3</b> Click the Classes tab.</li> <li><b>4</b> Search for and select the class you want to add.</li> <li><b>5</b> In the student's schedule, click the class you want to remove from the student's schedule.</li> <li><b>6</b> Click Transfer Class.</li> </ol>

For a description of the Student Schedule page, see "Understanding the Student Schedule Page" on page 322.

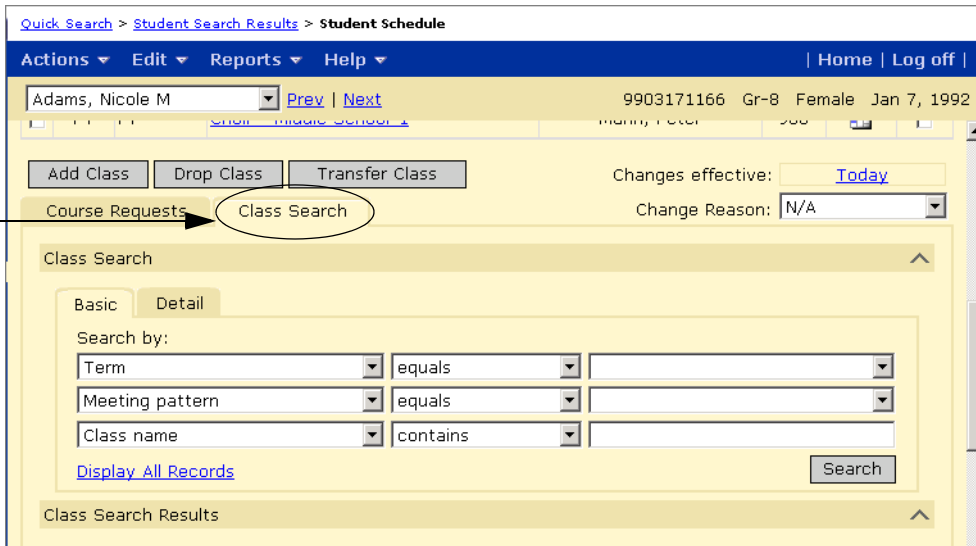
## Searching for Classes for Multiple Courses

When you are manually scheduling students into classes to fill in an incomplete schedule, you can use the Detail tab to search for classes for multiple courses. In this way, the search results show the classes available for all selected courses on one page, so you can select the most appropriate classes for each course.

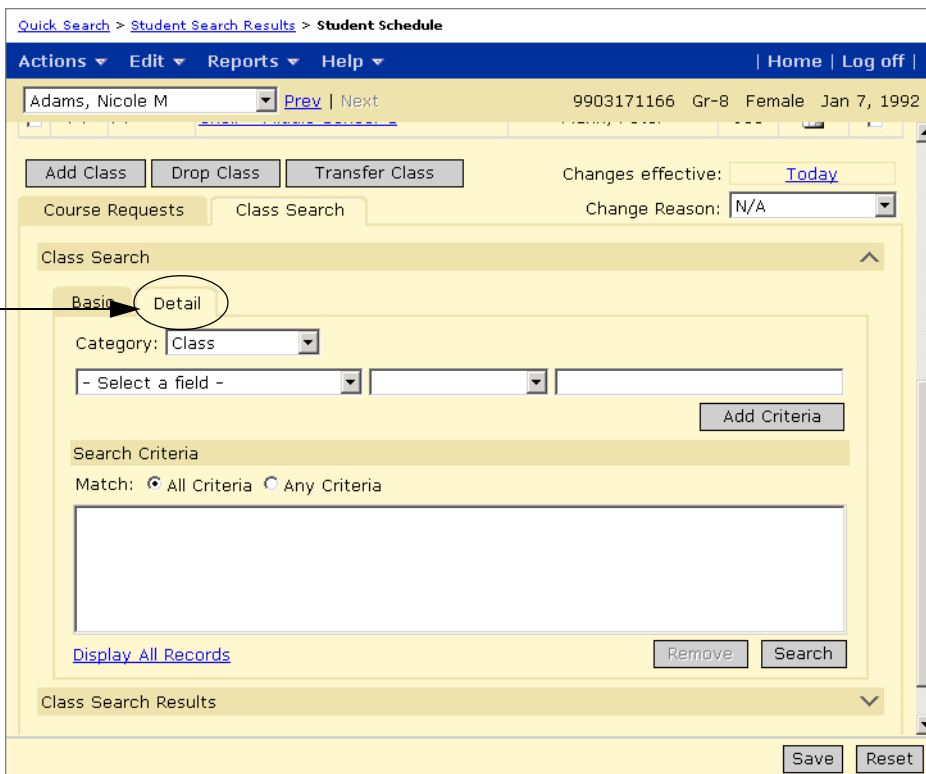
**To search for classes for multiple courses:**

- 1** Log on as a school administrator.
- 2** Open the student's schedule.

**3** Click the Class Search tab.



**4** Under Class Search, click the Detail tab.



**5** On the Detail tab, enter the following information:

Field	Description
Category	Select the category of the properties you want to search by; for example, to search by course number, select "Course".
First dropdown	Select the property you want to search for; for example, to search for course numbers, select "Course Number".
Middle dropdown	Select the operator; for example, to search for part of a course number, select "Contains". To search for an exact course number, select "Equals".
Third dropdown	Enter the value you want to search for; for example, the course number.

The following figure shows the search options available on the Detail tab:

To search for classes by course number, select "Course".

To search for classes by course number, select "Course number" and specify the course number you want to find.

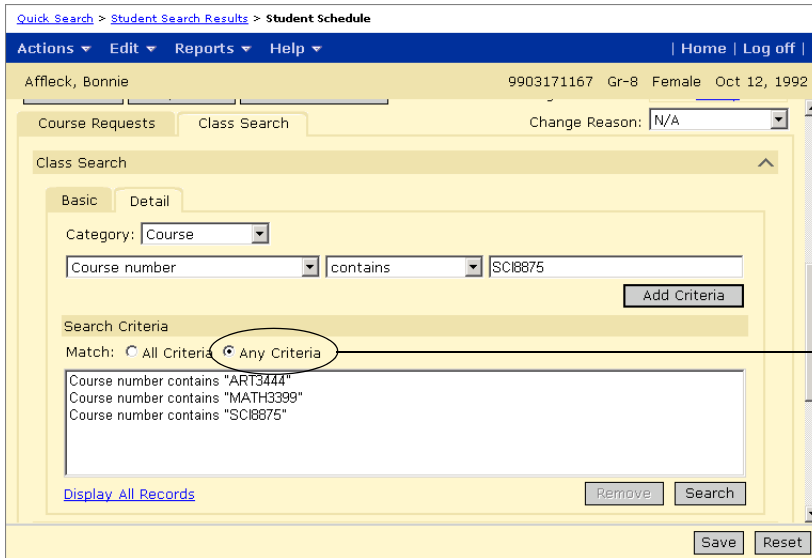
Click Add Criteria to add the criteria to the list of search criteria.

**6** Click Add Criteria.

**7** Repeat Steps 5 and 6 to add as many courses as you want to include in the search results.

**8** Under Search Criteria, click Any Criteria.

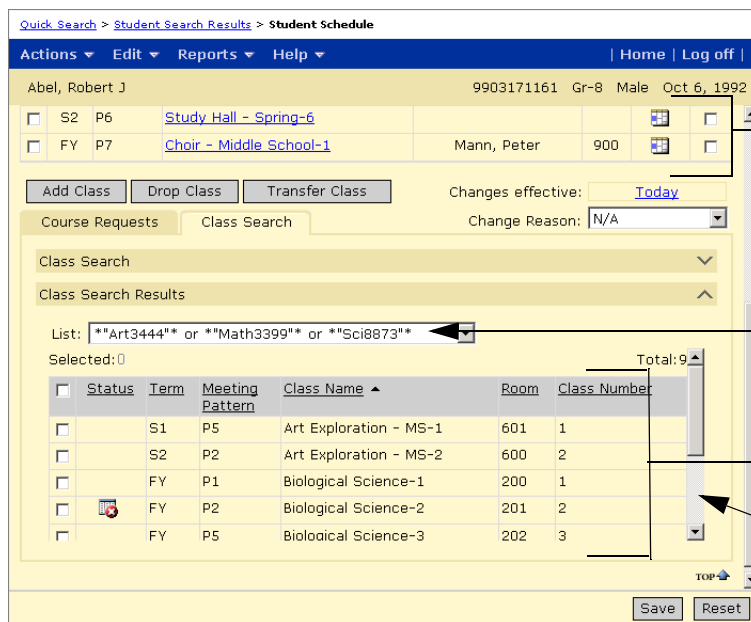
When you select Any Criteria, the search results include records that contain any of the criteria, that is, it creates an OR statement. If you select All Criteria, the search results include records that match all the listed criteria, that is, it creates an AND statement.



To search for records that match any of the entered criteria, click Any Criteria.

**9** When you have entered all the course numbers you want to search for, click Search.

**10** The search results include classes for all the entered courses.



Shows the student's current schedule.

Shows the courses included in the search results.

Lists the possible classes for the entered courses.

Use the scroll bar to see more classes in the list.

## Overview of Transferring Grades and Reassigning Attendance

If a student drops or transfers classes, you can transfer grades and reassign attendance to remove all record of the student ever being in the dropped class. After you transfer grades and reassign attendance, the dropped class is no longer included on the student's report cards or transcripts.

For example, a student finds their Algebra class too difficult and transfers to General Math. Algebra was offered in period 1 and General Math is in period 2, so they also transferred from their period 2 English class to a period 1 English class. You can use the transfer grades feature to remove all record of the Algebra and period 2 English classes from the student's schedule. You have several options for handling grades. In this example, you choose to transfer the grades from Algebra to General Math and from period 2 English to period 1 English.

If your school takes class attendance, you also need to specify how you want to handle the attendance for the changed classes. Again, you have several options. In this example, you choose to reassign attendance to the new classes according to the periods they are in, so attendance entered for the period 1 Algebra class is reassigned to period 1 English and the period 2 English attendance is reassigned to period 2 General Math.

Initial Student Schedule				Transfer Grades and Reassign Attendance	Modified Student Schedule			
Period	Class	Grade	Absences		Period	Class	Grade	Absences
1	Algebra	C-	2	→	1	English	A	2
2	English	A	0		2	General Math	C-	0

You can only transfer grades and reassign attendance if the following requirements are met:

- The classes were added or dropped with the same effective date.

### NOTE

If you use the Transfer button rather than the Add and Drop buttons, the added and dropped classes always have the same effective date.

- The dropped class has the same scheduling and grading structure as the added class. For example, you cannot transfer grades and reassign attendance from a full year class to a semester class.
- If both grades and attendance were entered for the dropped class, the attendance is reassigned or cleared at the same time the grades are transferred.
- To reassign attendance, the student's new schedule has a class scheduled in the same period as the dropped class. For example, if the student drops a period 1 Math class and his new schedule does not have a period 1 class, you cannot reassign the attendance entered for the period 1 Math class. You can clear attendance for this class and manually enter attendance.

Transferring grades and attendance is a two-part process:

- Add and drop or transfer classes on the student's schedule. For more information, see "Manually Adding, Dropping, or Transferring Classes" on page 329.
- Open the Transfer Grades page and specify how you want to handle grades and attendance for the dropped classes. For more information, see "Transferring Grades and Reassigning Attendance" on page 335.

For more information about how you can transfer grades in specific scenarios, see “Transferring Grades and Attendance - Examples” on page 338.

**NOTE**

After transferring grades and attendance, make sure you recalculate grades, credits, and GPAs for the student.

## Transferring Grades and Reassigning Attendance

After adding and dropping classes or transferring classes, you can open the Transfer Grades page and specify how you want to handle the grades and attendance for dropped classes.

You have the following options for handling the grades entered for the dropped class:

Option	Description
Do nothing	<p>Leaves the grades with the dropped class.</p> <p>If grades have been entered, the student’s record continues to include the dropped class, and the class is printed on their report cards and transcripts.</p> <p>Use this option if grades have not been entered for the dropped class or if it is part of a multi-period class and you have transferred the grades from another period of the class. For more information, see “Transferring Grades and Attendance - Examples” on page 338.</p>
Move	<p>The grades are transferred from the dropped class to the added class.</p> <p>If attendance has not been entered for the dropped class or the attendance is reassigned, the dropped class is no longer included in the student’s records and does not print on their report cards or transcripts.</p> <p>Use this option if classes are similar and the grades are relevant to the added class. For example, when transferring from Honors English to Regular English.</p>
Clear	<p>The grades entered for the dropped class are deleted.</p> <p>If attendance has not been entered for the dropped class or the attendance is reassigned, the dropped class is no longer included in the student’s records and does not print on their report cards or transcripts.</p> <p>Use this option if the classes are not similar, the grades would not make sense for the added classes and you want to manually enter grades. For example, when transferring from Art Exploration to Biology. You also use this option when transferring between two single-period classes and a multi-period class. For more information, see “Transferring Grades and Attendance - Examples” on page 338.</p>

Attendance is associated with the period the class is scheduled in, not with the class. When you reassign attendance, it is reassigned to the class that is offered in that period in the new schedule. For example, suppose a student transfers from Math in Period 1 to Math in Period 2 and English in Period 2 to English in Period 1. Prior to the transfer, the student was absent for three Math classes and two English classes. If you reassign attendance, the student’s records would show three absences for English and two absences for Math. If you want to keep

attendance values with the class rather than reassigning them to the period, you can clear the attendance values for the dropped class and manually enter the attendance for the added classes.

You have the following options for handling the attendance entered for the dropped class:

Option	Description
Do nothing	<p>Use this option if the class is not attendance bearing or if attendance has not been entered.</p> <p>If attendance has been entered, when you transfer grades, you must either clear or reassign the attendance.</p>
Reassign	<p>Reassigns the attendance entered for the dropped class to the class scheduled in that period in the new schedule.</p> <p>If grades have not been entered or are transferred or cleared, the dropped class is no longer included in the student's records and does not print on their report cards or transcripts.</p> <p>Use this option if you want to keep the attendance with the period for which it was entered.</p>
Clear	<p>Deletes the attendance entered for the dropped class.</p> <p>If grades have not been entered or are transferred or cleared, the dropped class is no longer included in the student's records and does not print on their report cards or transcripts.</p> <p>Use this option if you want to manually enter attendance for the added class.</p>

**To specify how grades are handled for the dropped class:**

- 1** Open a student schedule.
- 2** On the student schedule page, from the Actions menu, click View Change History.



- On the Schedule Change History page, from the Actions menu, click Transfer Grades. The Transfer Grades page displays a list of dropped and added classes. Click a row to change settings for a dropped class.

The Transfer To column includes courses added with the same effective dates as the dropped course. By default, the field shows the first added class in alphabetical order. Click the row to select a class.

If classes were rescheduled using the Transfer button, the Transfer To column automatically selects the class added during the transfer. You cannot change the selection.

- On the Transfer Grades page, for dropped classes, in the Transfer To column, select the added class you want to transfer grades to.

**NOTE**

If the class was transferred or if only one class was added on the same effective date as the dropped class, you do not need to specify a class to transfer the grades to.

- In the Grades column, select one of the following options:

To	Select
Take no action with grades, e.g., use this option if the class is not graded or if the grades have not been entered.	Do Nothing
Transfer the grades from the dropped class to the selected class that was added on the same effective date.	Move
Delete the grades entered for the dropped class without transferring these grades to another class.	Clear

6 In the Attendance column, select one of the following options:

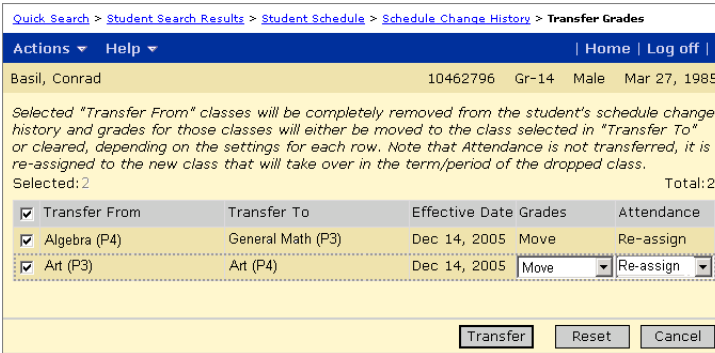
To	Select
Take no action with attendance, e.g., use this option if the class is not attendance-bearing or if attendance has not been taken.	Do Nothing
Reassign the attendance from the dropped class to the class now being offered in that period. For example, if the student transfers from a period 2 Math class and now has a period 2 English class, attendance is reassigned from Math to English and kept with the same period.	Reassign
Delete the attendance entered for the dropped class without transferring the attendance to another class.	Clear

7 Click Transfer.

When the transfer is complete, the selected classes are removed from the list of added and dropped classes and all record of the dropped class is removed from the student's change history.

## Transferring Grades and Attendance - Examples

The following table illustrates how you might handle grades and attendance when adding and dropping different types of classes:

Transfer From	Transfer To	Description															
Single-period class, e.g., Algebra	Single-period class, e.g., General Math	<p>When a student transfers to a different class, the change often affects other classes in the student's schedule. For example, the student finds Algebra too difficult so they transfer to General Math, but General Math is offered in a different period (P3) so they must change other classes in their schedule, such as transferring from Period 3 Art to Period 4 Art. You can transfer grades and reassign attendance for these classes, as shown below:</p>  <p>The screenshot shows the 'Transfer Grades' interface for student Basil, Conrad. It includes a table with the following data:</p> <table border="1"> <thead> <tr> <th>Transfer From</th> <th>Transfer To</th> <th>Effective Date</th> <th>Grades</th> <th>Attendance</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Algebra (P4)</td> <td>General Math (P3)</td> <td>Dec 14, 2005</td> <td>Move</td> <td>Re-assign</td> </tr> <tr> <td><input checked="" type="checkbox"/> Art (P3)</td> <td>Art (P4)</td> <td>Dec 14, 2005</td> <td>Move</td> <td>Re-assign</td> </tr> </tbody> </table>	Transfer From	Transfer To	Effective Date	Grades	Attendance	<input checked="" type="checkbox"/> Algebra (P4)	General Math (P3)	Dec 14, 2005	Move	Re-assign	<input checked="" type="checkbox"/> Art (P3)	Art (P4)	Dec 14, 2005	Move	Re-assign
Transfer From	Transfer To	Effective Date	Grades	Attendance													
<input checked="" type="checkbox"/> Algebra (P4)	General Math (P3)	Dec 14, 2005	Move	Re-assign													
<input checked="" type="checkbox"/> Art (P3)	Art (P4)	Dec 14, 2005	Move	Re-assign													

Transfer From	Transfer To	Description															
<p>Multi-period class, e.g., Team Sports-1</p>	<p>2 single-period classes, e.g., PE-1 and Art-4</p>	<p>When you transfer from a class offered in multiple periods, the class appears on multiple rows on the Transfer Grades page (one row for each period in which the class is offered). The multi-period class must be selected as the Transfer From class for two Transfer To classes. For example, a student is on the football team and takes Team Sports-1 (a multi-period class). They are cut from the football team and have to transfer to a regular PE class (a single-period class) and another elective (Art-4).                      The grades for the multi-period class can only be transferred to one of the added classes. For example, you could transfer the grades from Team Sports-1 to PE-1. The Grades column for the Art-4 class must be set to "Do Nothing". If you clear or reassign attendance for a multi-period class, all the periods for the class must have the same attendance option, i.e., all set to reassign or all set to clear.</p> <div data-bbox="727 814 1445 1171" style="border: 1px solid black; padding: 5px;"> <p><a href="#">Quick Search</a> &gt; <a href="#">Student Search Results</a> &gt; <a href="#">Student Schedule</a> &gt; <a href="#">Schedule Change History</a> &gt; <b>Transfer Grades</b></p> <p>Actions ▾ Help ▾   Home   Log off  </p> <p>Basil, Conrad 10462796 Gr-14 Male Mar 27, 1985</p> <p><i>Selected "Transfer From" classes will be completely removed from the student's schedule change history and grades for those classes will either be moved to the class selected in "Transfer To" or cleared, depending on the settings for each row. Note that Attendance is not transferred, it is re-assigned to the new class that will take over in the term/period of the dropped class.</i></p> <p>Selected: 2 Total: 2</p> <table border="1"> <thead> <tr> <th>Transfer From</th> <th>Transfer To</th> <th>Effective Date</th> <th>Grades</th> <th>Attendance</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Team Sports-1 (P3, P4)</td> <td>PE-1 (P3)</td> <td>Dec 14, 2005</td> <td>Move</td> <td>Re-assign</td> </tr> <tr> <td><input checked="" type="checkbox"/> Team Sports-1 (P3, P4)</td> <td>Art (P4)</td> <td>Dec 14, 2005</td> <td>Do Nothing ▾</td> <td>Re-assign ▾</td> </tr> </tbody> </table> <p style="text-align: right;">Transfer Reset Cancel</p> </div>	Transfer From	Transfer To	Effective Date	Grades	Attendance	<input checked="" type="checkbox"/> Team Sports-1 (P3, P4)	PE-1 (P3)	Dec 14, 2005	Move	Re-assign	<input checked="" type="checkbox"/> Team Sports-1 (P3, P4)	Art (P4)	Dec 14, 2005	Do Nothing ▾	Re-assign ▾
Transfer From	Transfer To	Effective Date	Grades	Attendance													
<input checked="" type="checkbox"/> Team Sports-1 (P3, P4)	PE-1 (P3)	Dec 14, 2005	Move	Re-assign													
<input checked="" type="checkbox"/> Team Sports-1 (P3, P4)	Art (P4)	Dec 14, 2005	Do Nothing ▾	Re-assign ▾													
<p>2 single-period classes, e.g., PE-1 and Art-4</p>	<p>Multi-period class, e.g., Team Sports-1</p>	<p>If a student transfers into a multi-period class from two single-period classes, the multi-period class must be selected as the Transfer To class for both Transfer From classes. You can transfer grades from one of the single-period classes to the multi-period class. The Grades column for the other single-period class must be set to Clear. If you clear or reassign attendance for a multi-period class, all the periods for the class must have the same attendance option, i.e., all set to reassign or all set to clear.</p> <div data-bbox="727 1472 1445 1829" style="border: 1px solid black; padding: 5px;"> <p><a href="#">Quick Search</a> &gt; <a href="#">Student Search Results</a> &gt; <a href="#">Student Schedule</a> &gt; <a href="#">Schedule Change History</a> &gt; <b>Transfer Grades</b></p> <p>Actions ▾ Help ▾   Home   Log off  </p> <p>Basil, Conrad 10462796 Gr-14 Male Mar 27, 1985</p> <p><i>Selected "Transfer From" classes will be completely removed from the student's schedule change history and grades for those classes will either be moved to the class selected in "Transfer To" or cleared, depending on the settings for each row. Note that Attendance is not transferred, it is re-assigned to the new class that will take over in the term/period of the dropped class.</i></p> <p>Selected: 2 Total: 2</p> <table border="1"> <thead> <tr> <th>Transfer From</th> <th>Transfer To</th> <th>Effective Date</th> <th>Grades</th> <th>Attendance</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> PE-1 (P3)</td> <td>Team Sports-1 (P3, P4)</td> <td>Dec 14, 2005</td> <td>Move</td> <td>Re-assign</td> </tr> <tr> <td><input checked="" type="checkbox"/> Art (P4)</td> <td>Team Sports-1 (P3, P4)</td> <td>Dec 14, 2005</td> <td>Clear ▾</td> <td>Re-assign ▾</td> </tr> </tbody> </table> <p style="text-align: right;">Transfer Reset Cancel</p> </div>	Transfer From	Transfer To	Effective Date	Grades	Attendance	<input checked="" type="checkbox"/> PE-1 (P3)	Team Sports-1 (P3, P4)	Dec 14, 2005	Move	Re-assign	<input checked="" type="checkbox"/> Art (P4)	Team Sports-1 (P3, P4)	Dec 14, 2005	Clear ▾	Re-assign ▾
Transfer From	Transfer To	Effective Date	Grades	Attendance													
<input checked="" type="checkbox"/> PE-1 (P3)	Team Sports-1 (P3, P4)	Dec 14, 2005	Move	Re-assign													
<input checked="" type="checkbox"/> Art (P4)	Team Sports-1 (P3, P4)	Dec 14, 2005	Clear ▾	Re-assign ▾													

<b>Transfer From</b>	<b>Transfer To</b>	<b>Description</b>
Class scheduled with a full-year term set	Class scheduled with a semester term set	Not supported. At this point, you cannot transfer grades and attendance between courses with different scheduling structures.
Class using a letter grade grading table	Class using a numeric grade grading table	Not supported. You can only transfer grades and attendance between classes that use the same grading structure, i.e., they use the same grading table and grading period set.

## Viewing an Audit Trail of Changes to Grades and Attendance

You can use audit trails to query grade transfers and attendance reassignments, along with other changes to student information. Audit trails are time-stamped records of user activity in Chancery SMS.

When you transfer grades or reassign attendance for class changes, Chancery SMS records the grade and attendance changes in the Audit Log. The Audit Log also keeps a record of the affected grades and any non-default attendance. For example, if you clear the grades for a dropped course, the Audit Log indicates that the grades were cleared and shows the grades that were entered for the dropped course. If you reassign attendance, the Audit Log indicates that attendance was reassigned and shows the non-default attendance values associated with the period.

For more information, see “Using Audit Reports” in the Chancery SMS District Administration Guide.

### To view audit trail records for grade transfers:

- 1** Log on as a school administrator.
- 2** In the control bar, under Admin, click School Setup.
- 3** On the School Setup page, under Audit, click Audit Log.
- 4** On the Audit Log page, from the Type dropdown, click Transfer Grades.
- 5** To select the date range in which to search, click the appropriate calendar icon.

If needed, enter the name of a staff member, a district’s student ID number, or the social security number of a student to narrow your search.

**6** Click Search.

The search results display the Audit Log records for the search criteria.

**Audit Log Search Criteria**

Type: **Transfer Grades**

\*Date Range: **04/10/2006** - **04/13/2006** mm/dd/yyyy

User Name (User ID):

Student ID:

**Search**

---

**Search Result** Total: 4

Date	User Name	Type	Description
Apr 13,06 2:38PM	Buterbaugh, @Reed Z (a1046.3)	Transfer Grades	Student: TG-Engel, @Emerson Student ID: 10461313 Grades moved via Transfer Grades: <b>Grades transferred</b> From Course: CRD-Geography From Class: CRD-Geography-61 To Course: Team Sports To Class: Team Sports D-506 Grading Period   Grade Item   Grade RQ1   Course   85 PR1   Course   82 PR1   Sem   Med RQ1   Odd   Inc RQ1   SCm
Apr 13,06 2:38PM	Buterbaugh, @Reed Z (a1046.3)	Transfer Grades	Student: TG-Engel, @Emerson Student ID: 10461313 Grades cleared via Transfer Grad <b>Grades cleared</b> Course: MA - Biotechnology Class: MA - Biotechnology-51 Grading Period   Grade Item   Grade RQ1   SCm RQ1   Odd   76 RQ1   Course   67 PR1   Sem   E PR1   Course   42

\*Required

- 7 To preview the Audit Log, from the Actions menu, click Print. The PDF Viewer opens in a new window.

Audit Log - Transfer Grades			
Date	User Name	Type	Description
Apr 13, 08 2:38PM	Buterbaugh, @Reed Z (a1046.3)	Transfer Grades	Student: TG-Engel, @Emerson Student ID: 10461313 Grades moved via Transfer Grades: From Course: CRD-Geography From Class: CRD-Geography-61 To Course: Team Sports To Class: Team Sports D-508 Grading PeriodGrade ItemGrade RQ1Course85 PR1Course82 PR1SemMed RQ1OddInc RQ1SCm
Apr 13, 08 2:38PM	Buterbaugh, @Reed Z (a1046.3)	Transfer Grades	Student: TG-Engel, @Emerson Student ID: 10461313 Grades cleared via Transfer Grades: Course: MA - Biotechnology Class: MA - Biotechnology-51 Grading PeriodGrade ItemGrade RQ1SCm RQ1Odd76 RQ1Course67 PR1SemE PR1Course42

- 8 Close the PDF Viewer.

**To view audit trail records for grade transfers:**

- 1 Log on as a school administrator.
- 2 In the control bar, under Admin, click School Setup.
- 3 On the School Setup page, under Audit, click Audit Log.
- 4 On the Audit Log page, from the Type dropdown, click Transfer Grades.
- 5 To select the date range in which to search, click the appropriate calendar icon.

If you need to narrow your search, enter the name of a staff member, a district’s student ID number, or the social security number of a student.

**6** Click Search.

The search results display the Audit Log records for the search criteria.

The screenshot shows the 'Audit Log' search interface. The search criteria are: Type: Re-assign Attendance, Date Range: 04/10/2006 - 04/13/2006, User Name: Buterbaugh, @Reed Z (a1046.3), and Student ID: 10461313. The search results show two records. The first record is annotated with arrows pointing to the description and the table of non-default attendance codes. The second record is annotated with an arrow pointing to the description.

Date	User Name	Type	Description																					
Apr 13,06 2:38PM	Buterbaugh, @Reed Z (a1046.3)	Re-assign Attendance	Student: TG-Engel, @Emerson Student ID: 10461313 Attendance re-assigned via Transfer Grades: Original Class: CRD-Geography-61 Replaced by Class: Team Sports D-506 The non-default Attendance Codes that were re-assigned are: <table border="1"> <thead> <tr> <th>Date</th> <th>Period</th> <th>Attendance Code</th> </tr> </thead> <tbody> <tr><td>07/27/2005</td><td>P6</td><td>AEx</td></tr> <tr><td>07/29/2005</td><td>P6</td><td>A</td></tr> <tr><td>08/05/2005</td><td>P6</td><td>T</td></tr> <tr><td>08/08/2005</td><td>P6</td><td>TEEx</td></tr> <tr><td>11/21/2005</td><td>P6</td><td>A</td></tr> <tr><td>11/22/2005</td><td>P6</td><td>TEEx</td></tr> </tbody> </table>	Date	Period	Attendance Code	07/27/2005	P6	AEx	07/29/2005	P6	A	08/05/2005	P6	T	08/08/2005	P6	TEEx	11/21/2005	P6	A	11/22/2005	P6	TEEx
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07/26/2005	P5	AEx																						
08/05/2005	P5	T																						
11/21/2005	P5	A																						
11/22/2005	P5	TEEx																						

**7** To preview, print, or save the Audit Log, from the Actions menu, click Print.

The PDF Viewer opens in a new window.

**Audit Log - Reassign Attendance** 4 total

Date	User Name	Type	Description
Apr 13,06 2:38PM	Buterbaugh, @Reed Z (a1046.3)	Re-assign Attendance	Student: TG-Engel, @Emerson Student ID: 10461313 Attendance re-assigned via Transfer Grades: Original Class: CRD-Geography-61 Replaced by Class: Team Sports D-506 The non-default Attendance Codes that were re-assigned are: DatePeriodAttendance Code 07/27/2005P6AEx 07/29/2005P6A 08/05/2005P6T 08/08/2005P6TEEx 11/21/2005P6A 11/22/2005P6TEEx
Apr 13,06 2:38PM	Buterbaugh, @Reed Z (a1046.3)	Re-assign Attendance	Student: TG-Engel, @Emerson Student ID: 10461313 Attendance cleared via Transfer Grades for Class: MA - Biotechnology-51 Attendance Date Range: 07/18/2005 - 12/07/2005 The non-default Attendance Codes that were cleared are: DatePeriodAttendance Code 07/25/2005P5A 07/26/2005P5AEx 08/05/2005P5T

- 8 If desired, click Save or Print.
- 9 Close the PDF Viewer.

## Locking Classes in Student Schedules

After a student is assigned to a class, you can lock that class on their schedule. If a class is locked, automatic scheduling processes, such as the Student Loader and Walk-in Scheduler, will not remove that class from the student's schedule.

### NOTE

If you are using automatic scheduling processes, such as the Walk-in Scheduler, do not lock classes unless you are certain the student must be in the specified class. Locking classes prevents the scheduler from changing the class assignment and limits its ability to generate a full schedule for students.

For a description of the Student Schedule page, see "Understanding the Student Schedule Page" on page 322.

### To lock a class in a student's schedule:

- 1 Log on as a school administrator.
- 2 Open the student's schedule.  
For more information about opening student schedules, see "Opening Student Schedules" on page 321.
- 3 In the student's schedule, select the checkbox in the Lock column for the class you want to lock.
- 4 Click Save.

### To lock all classes in the student's schedule:

- 1 Log on as a school administrator.
- 2 Open the student's schedule.  
For more information about opening student schedules, see "Opening Student Schedules" on page 321.
- 3 From the Actions menu, click Lock All Classes.  
All scheduled classes in the student's schedule are locked.

### To unlock all classes in the student's schedule:

- 1 Log on as a school administrator.
- 2 Open the student's schedule.  
For more information about opening student schedules, see "Opening Student Schedules" on page 321.
- 3 From the Actions menu, click Unlock All Classes.  
All scheduled classes in the student's schedule are unlocked.




## Adding and Deleting Resource Assignments

From the Student Schedule page, you can add or delete resource assignments for individual students. Assign resource services to students who require extra attention because they may be struggling or advanced. For example, resource services include Remedial Reading and Math, Speech Therapy, Gifted and Talented Enrichment, and so on.

Before you add a resource assignment to a student schedule, you must set up resource services. For more information about setting up resource services, see "Setting Up Resource Services (active calendar only)" on page 313.

If you want to assign the same resource service to multiple students, use the Resource Roster. For more information about assigning resource services to multiple students, see "Assigning Resource Services to Students" on page 314.

### To add a resource assignment to a student's schedule:

- 1 Log on as a school administrator.
- 2 Open a student schedule.  
For more information about opening student schedules, see "Opening Student Schedules" on page 321.
- 3 From the Actions menu, click Add Resource Assignment.
- 4 On the Add Resource Assignment page, enter the required resource service information.
- 5 Click OK.  
The Student Schedule page displays the student's revised schedule. The Resource Assignment icon (  ) indicates resource assignments.

### To delete a resource assignment from a student's schedule:

#### NOTE

When you delete a resource assignment, you delete all record of the assignment. If you want to end a resource assignment without deleting the entire record, adjust the End Date for the resource assignment.

- 1 Log on as a school administrator.
- 2 Open a student schedule.  
For more information about opening student schedules, see "Opening Student Schedules" on page 321.
- 3 Select a Resource Assignment.
- 4 From the Actions menu, click Delete Resource Assignment.
- 5 Click OK.  
The Student Schedule page displays the student's revised schedule.

## Viewing Change History

You can view a history of changes for each class a student has enrolled in. For example, you can view when a student has transferred from one class to another or when they changed homerooms. For each change, you can specify the effective date, select a change reason, and include a comment.

The schedule change history is only available in the active calendar and only shows changes over time. For example, if a class is added and dropped as of the same day, the change is not recorded in the change history. You can undo some schedule changes. For more information about undoing schedule changes, see "Reversing Student Schedule Changes" on page 347.

The change history does not include changes made by automatic scheduling processes such as the Student Loader or Walk-in Scheduler.

**To view a student's change history:**

- 1 Log on as a school administrator.
- 2 Open a student schedule.  
For more information about opening student schedules, see "Opening Student Schedules" on page 321.
- 3 On the Student Schedule page, from the Actions menu, click View Change History.  
The Schedule Change History page displays a list of the changes made to the student's schedule.
- 4 To change the effective date, change reason, or comment for a specific schedule change, click the link in the Start column or select the line and click Edit.

Quick Search > Student Search Results > Student Schedule > Schedule Change History

Abadie, Branden 10462530 Gr-9 Male Feb 26, 1988

Grade and Homeroom Change History

Selected: 0 Total: 2

<input type="checkbox"/>	Grade	Homeroom	Start	Change Reason	Comment
<input type="checkbox"/>	9	09A	<a href="#">Oct 12, 2004</a>		
<input type="checkbox"/>	9	09B	<a href="#">Feb 16, 2005</a>		

Edit... Undo Last

Class Change History

Note: Only the last change within each set of changes can potentially be undone (indicated by a 'Y' in the Can Undo column). Other business rules may still prevent you from undoing this transaction.

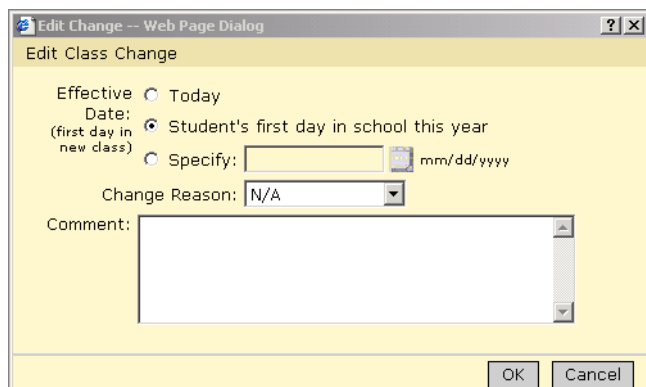
Selected: 0 Total: 2

<input type="checkbox"/>	Drop Class	Add Class	Start	Change Reason	Comment	Can Undo
<input type="checkbox"/>		CRD-Chemistry-1	<a href="#">May 11, 2005</a>	01		Y
<input type="checkbox"/>		Early Start-1	<a href="#">May 11, 2005</a>	01		Y

Edit... Undo Selected

To see the change reason description, pause the pointer over the change reason code.

- 5 On the Edit Change page, make the necessary changes and click OK.



## Reversing Student Schedule Changes

From the Change History page, you can reverse a change made to the student's schedule. You can only undo the last change within each set of changes. If a change can be undone, a "Y" appears in the Can Undo column.

### To undo a change to the students schedule:

- 1 Log on as a school administrator.
- 2 Open a student schedule.  
For more information about opening student schedules, see "Opening Student Schedules" on page 321.
- 3 On the Student Schedule page, from the Actions menu, click View Change History.
- 4 Select the change you want to reverse.  
There must be a "Y" in the Can Undo column.
- 5 Click Undo Last or Undo Selection. Click OK.



# Working with Homeroom and Class Rosters

Rosters provide a list of students assigned to a homeroom or class. You can display the roster and make adjustments, if necessary, from the roster page.

## Viewing Class Rosters

- 1 Log on as a school administrator.
- 2 In the control bar, under Class, click Classes.

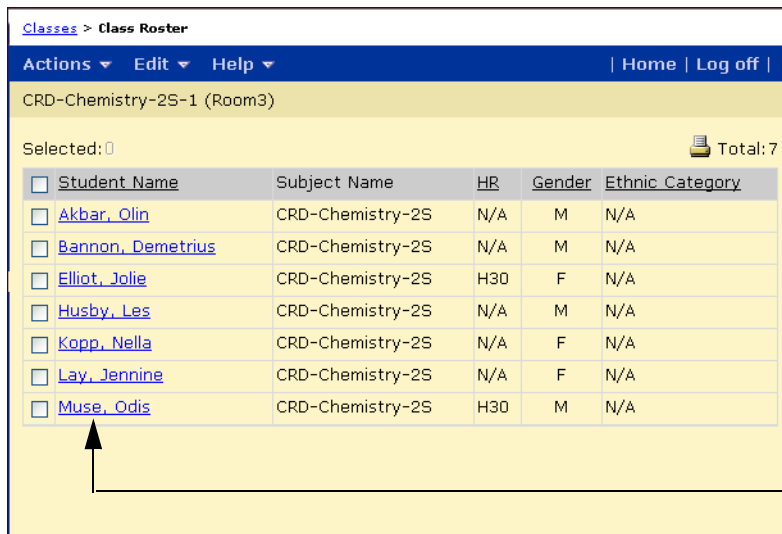
The screenshot shows the 'Classes' interface with a search bar and a table of class records. The search bar has tabs for 'Basic' and 'Detail'. The search criteria are: Term equals Semester 2, Meeting pattern equals, and Class name contains. The table has columns for Class, Teacher, Term, Meeting Pattern, Room, Roster, Attendance, and Grading. The 'CRD-English-2S-Off-1' class is highlighted, and its roster icon is circled.

<input type="checkbox"/>	Class	Teacher	Term	Meeting Pattern	Room	Roster	Attendance	Grading
<input type="checkbox"/>	<a href="#">CRD-Chemistry-2S-1</a>	Ament, Tiffani	S1	MP1	Room3			
<input type="checkbox"/>	<a href="#">CRD-Chemistry-DB-1</a>	Bascom, Lana	S1	SB4	Room15			
<input type="checkbox"/>	<a href="#">CRD-Chemistry-DB-2</a>	Bascom, Lana	S2	DB1	Room15			
<input type="checkbox"/>	<a href="#">CRD-English-2S-1</a>	Ament, Tiffani	S1	MP2	Room3			
<input type="checkbox"/>	<a href="#">CRD-English-2S-Off-1</a>	Baines, Loreta	S1	OFF1	Room10			

To view the class roster, click the class name or click the roster icon.

- 3 On the Classes page, click the class you want to view.  
OR


On the Classes page, click the Roster icon (  ) for the class you want to view.



Classes > Class Roster

Actions Edit Help | Home | Log off |

CRD-Chemistry-2S-1 (Room3)

Selected: 0  Total: 7

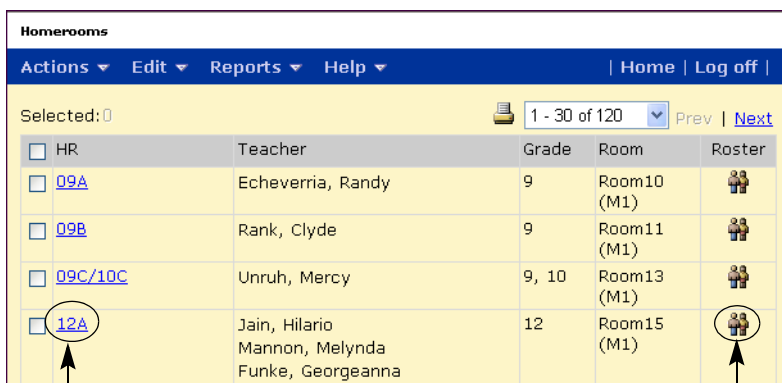
<input type="checkbox"/> Student Name	Subject Name	HR	Gender	Ethnic Category
<input type="checkbox"/> <a href="#">Akbar, Olin</a>	CRD-Chemistry-2S	N/A	M	N/A
<input type="checkbox"/> <a href="#">Bannon, Demetrius</a>	CRD-Chemistry-2S	N/A	M	N/A
<input type="checkbox"/> <a href="#">Elliot, Jolie</a>	CRD-Chemistry-2S	H30	F	N/A
<input type="checkbox"/> <a href="#">Husby, Les</a>	CRD-Chemistry-2S	N/A	M	N/A
<input type="checkbox"/> <a href="#">Kopp, Nella</a>	CRD-Chemistry-2S	N/A	F	N/A
<input type="checkbox"/> <a href="#">Lay, Jennine</a>	CRD-Chemistry-2S	N/A	F	N/A
<input type="checkbox"/> <a href="#">Muse, Odis</a>	CRD-Chemistry-2S	H30	M	N/A

To open a student record, click the student name.

- 4 On the Class Roster page, you can change the information displayed on the screen. For more information about changing the roster display, see "Changing the Information Displayed on Roster Pages" on page 351.


## Viewing Homeroom Rosters





- 1 Log on as a school administrator.
- 2 In the control bar, under Class, click Homerooms.



Homerooms

Actions Edit Reports Help | Home | Log off |

Selected: 0  1 - 30 of 120 [Prev](#) | [Next](#)

<input type="checkbox"/> HR	Teacher	Grade	Room	Roster
<input type="checkbox"/> <a href="#">09A</a>	Echeverria, Randy	9	Room10 (M1)	
<input type="checkbox"/> <a href="#">09B</a>	Rank, Clyde	9	Room11 (M1)	
<input type="checkbox"/> <a href="#">09C/10C</a>	Unruh, Mercy	9, 10	Room13 (M1)	
<input type="checkbox"/> <a href="#">12A</a>	Jain, Hilario Mannon, Melynda Funke, Georgeanna	12	Room15 (M1)	

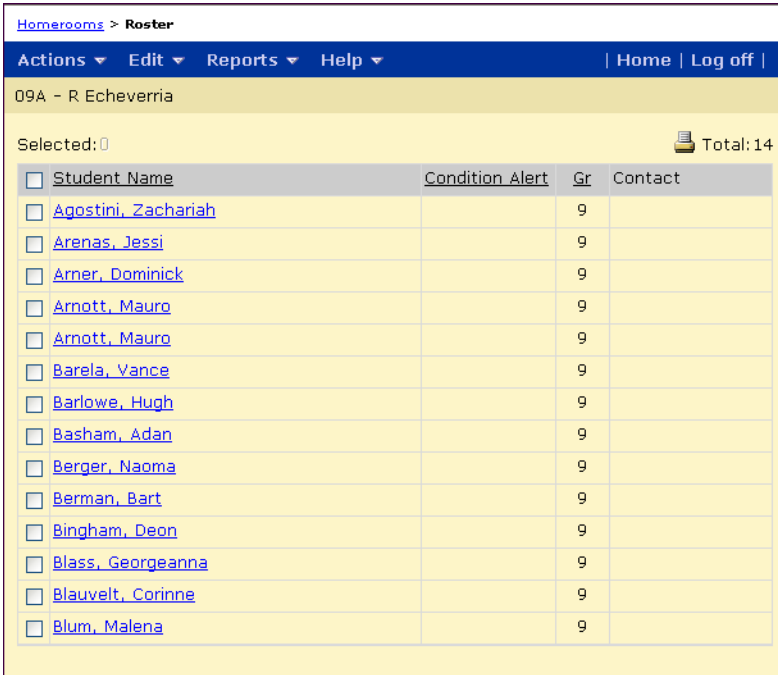
To view the homeroom roster, click the homeroom name or click the roster icon.

- 3** On the Homerooms page, click the homeroom you want to view.

OR

On the Homerooms page, click the Roster icon () for the homeroom you want to view.


The Roster page opens.



Homerooms > Roster

Actions ▾ Edit ▾ Reports ▾ Help ▾ | Home | Log off |

09A - R Echeverria

Selected: 0  Total: 14


<input type="checkbox"/>	Student Name	Condition Alert	Gr	Contact
<input type="checkbox"/>	<a href="#">Agostini, Zachariah</a>		9	
<input type="checkbox"/>	<a href="#">Arenas, Jessi</a>		9	
<input type="checkbox"/>	<a href="#">Arner, Dominick</a>		9	
<input type="checkbox"/>	<a href="#">Arnott, Mauro</a>		9	
<input type="checkbox"/>	<a href="#">Arnott, Mauro</a>		9	
<input type="checkbox"/>	<a href="#">Barela, Vance</a>		9	
<input type="checkbox"/>	<a href="#">Barlowe, Hugh</a>		9	
<input type="checkbox"/>	<a href="#">Basham, Adan</a>		9	
<input type="checkbox"/>	<a href="#">Berger, Naoma</a>		9	
<input type="checkbox"/>	<a href="#">Berman, Bart</a>		9	
<input type="checkbox"/>	<a href="#">Bingham, Deon</a>		9	
<input type="checkbox"/>	<a href="#">Blass, Georgeanna</a>		9	
<input type="checkbox"/>	<a href="#">Blauvelt, Corinne</a>		9	
<input type="checkbox"/>	<a href="#">Blum, Malena</a>		9	



- 4** On the Homeroom Roster page, you can change the information displayed on the screen. For more information about changing the roster display, see “Changing the Information Displayed on Roster Pages” on page 351.

## Changing the Information Displayed on Roster Pages

To assist you in adjusting homeroom and class rosters, you can change the student information displayed on class and homeroom roster pages. You can display incoming or withdrawn students and you can change the columns included on the page.

### To change the information displayed on the screen:

- Log on as a school administrator.
- Open a class or homeroom roster.  
For information about opening a class roster, see “Viewing Class Rosters” on page 349. For information about opening homeroom rosters, see “Viewing Homeroom Rosters” on page 350.
- From the Edit menu, click Choose Columns > Class Search Results.
- In the Available Columns list, select the columns you want to display, and then click  to move them to the Selected Columns list.

- 5 Use the  and  buttons to set the display order.
- 6 Click OK.

**To include withdrawn or incoming students:**

- 1 Log on as a school administrator.
- 2 Open a class or homeroom roster.  
For information about opening class rosters, see “Viewing Class Rosters” on page 349.  
For information about opening homeroom rosters, see “Viewing Homeroom Rosters” on page 350.
- 3 From the Edit menu, click Show Incoming Students.  
OR  
From the Edit menu, click Show Withdrawn Students.

## Modifying Homeroom and Class Rosters

At the beginning of the school year, finish your schedule by transferring students to correct homeroom, class, and subject assignments. You can adjust the rosters for all classes and subjects to incorporate team teaching or group students by ability. For more information about adjusting a roster at the beginning of the school year, see “Transferring Homerooms” on page 355.

During the school year, transfer students to assign them to a new class or subject, as required. For example, a group of students might take Music for the first half of the year and Art for the second half of the year. For more information about transferring students during the school year, see “Changing Class Rosters” on page 352.

## Changing Class Rosters

After school starts, you may need to adjust class rosters from time to time. For example, you may need to adjust a class roster to complete the following tasks:

- Assign walk-in students to a class.
- Find the best homeroom for a student and manually adjust a student’s schedule.
- Schedule a student to receive or stop receiving resource services partway into the school year.
- Adjust a student’s schedule based on individual student needs, such as moving a student to a faster or slower paced Math class. This change can be made at the start of the school year or partway through the school year.

**NOTE**

If the class assignment changes result in any class exceeding their defined capacity, you must have the Classes - Exceed Capacity permission set to “Yes” to make the changes.

**To add, drop, or transfer students:**

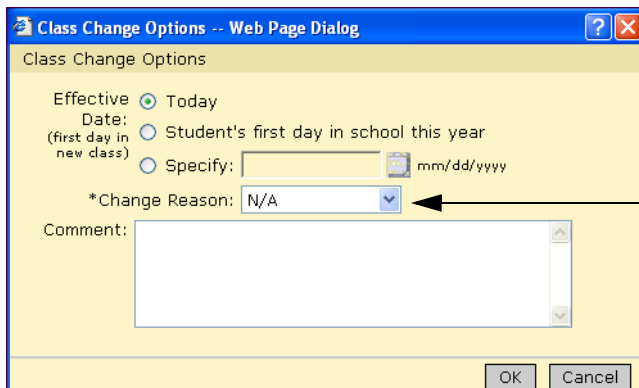
- 1 Log on as a school administrator.
- 2 Open a class roster.  
For more information about opening class rosters, see “Viewing Class Rosters” on page 349.



**3** On the Class Roster page, do one of the following:

To	Do this
Add a student to the class	<ol style="list-style-type: none"> <li>1 From the Actions menu, click Add Student.</li> <li>2 In the Select Student dialog, select the students you want to add.</li> <li>3 Click OK.</li> </ol>
Drop a student from the class	<ol style="list-style-type: none"> <li>1 Select the students you want to drop.</li> <li>2 From the Actions menu, click Drop Students.</li> </ol>
Transfer students to a different class	<ol style="list-style-type: none"> <li>1 Select the students you want to transfer.</li> <li>2 From the Actions menu, click Transfer Students.</li> <li>3 On the Transfer to Class page, select the class you want to transfer them into. Click OK.</li> </ol>

**4** If you are working in the active calendar, in the Class Change Options dialog, specify the date you want these students to be added, enter a comment, and, if available, select a change reason. Click OK.



If you are working in the active calendar, the Change Reason dropdown appears if change reasons are set up at the district. Change reasons may be required or optional.

**5** Click Save.

## Adding Groups of Students to Other Classes

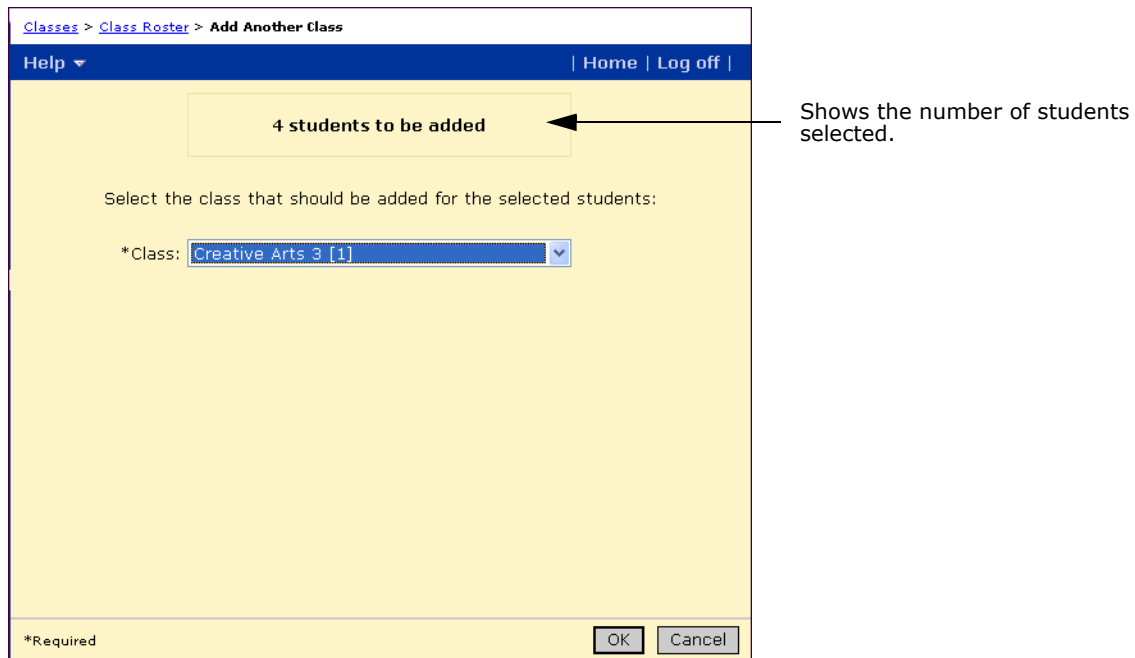
You can select a group of students and add them to several classes, one after another. For example, after you add students to the first term Music class, you can add the entire group of students to the second term Art class.

### NOTE

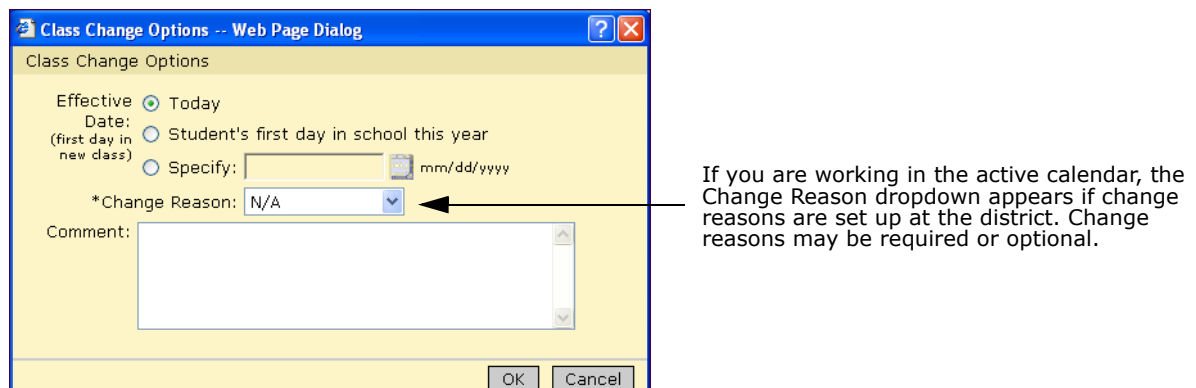
If the class assignment changes result in any class exceeding their defined capacity, you must have the Classes - Exceed Capacity permission set to “Yes” to make the changes.

- 1 Log on as a school administrator.
- 2 Open a class roster.  
For more information about opening class rosters, see “Viewing Class Rosters” on page 349.
- 3 On the Class Roster page, select the students you want to add to another class.

- 4 From the Actions menu, click Add Another Class.



- 5 From the Class dropdown, select the class for these students. Click OK.
- 6 If you are working in the active calendar, in the Class Change Options dialog, specify the date you want these students to be added, enter a comment, and, if available, select a change reason. Click OK.



## Assigning Groups of Students to Classes

From a class or homeroom roster, you can select a group of students and assign them to specific classes.

### NOTE

If the class assignment changes result in any class exceeding their defined capacity, you must have the Classes - Exceed Capacity permission set to “Yes” to make the changes.

**To assign groups of students to classes:**

- 1 Log on as a school administrator.
- 2 Open a class or homeroom roster.  
For more information about opening class rosters, see “Viewing Class Rosters” on page 349. For more information about opening homeroom rosters, see “Viewing Homeroom Rosters” on page 350.
- 3 On the class or homeroom roster, select the students you want to assign to classes.
- 4 From the Actions menu, click Assign > Classes.

Indicates the number of students whose schedules will be changed.

- 5 On the Assign Classes page, in the Class Search panel, search for classes you want to add to the students' schedules.
- 6 If you are working in the active calendar and change reasons are set up at the district, in the Change Reasons dropdown, select a reason for the change.
- 7 In the Search Results panel, select the classes you want to add. Click Apply.

**Transferring Homerooms**

You can transfer students between homerooms from the Roster page. This method is particularly useful at the beginning of the school year when you are setting up schedules.

**To transfer students to different homerooms:**

- 1 Log on as a school administrator.
- 2 Open a homeroom roster.  
For more information about opening homeroom rosters, see "Viewing Homeroom Rosters" on page 350.
- 3 On the Roster page, select the students you want to assign to another homeroom. From the Actions menu, click Transfer Homeroom.
- 4 On the Transfer Homeroom page, select the new homeroom you want to transfer the selected students to.

Homerooms > Roster > Transfer Homeroom

Help ▾ | Home | Log off |

6 students selected in grade 3.  
Select the homeroom to transfer to for these students. The following statistics do not include the selected students.

HR	Teacher	Grade	M	F	Total	1	2	3	4	5
<input type="radio"/>	3-A Lee, Daniela	3	2	2	4	0	3	0	0	1
<input checked="" type="radio"/>	3-B Paterson, Diane	3	7	3	10 !	1	5	0	0	3

Total: 2

! Capacity will be exceeded.

Ethnic Categories:  
 1) Asian    4) Native American  
 2) Black    5) White  
 3) Hispanic

OK Cancel

Check to see if the homeroom has enough space to accommodate the selected students.

An exclamation mark indicates the homeroom does not have enough space to accommodate the selected students.

The numbers correspond to the Ethnic Categories.

- 5 Click OK.

- 6 If you are working in the active calendar, in the Change Options dialog, specify the date you want these students to be added, enter a comment, and, if available, select a change reason. Click OK.

Class Change Options -- Web Page Dialog

Class Change Options

Effective  Today  
Date:  Student's first day in school this year  
(first day in new class)  Specify:  mm/dd/yyyy

\*Change Reason: N/A

Comment:

OK Cancel

If you are working on the active calendar, the Change Reason dropdown appears if change reasons are set up at the district. Change reasons may be required or optional.



# Index

## A

- active schedule, setting structure of 171
- active students 89, 231
- alternate requests
  - about 247
  - adding for students 247
  - changing for multiple students 253
  - deleting for students 253
  - individual students, assigning to 250
- attendance
  - collecting for courses 148
  - reassigning
    - about 334
    - examples 338
    - options for 335
- attendance calculation rules, including periods in 35, 186
- audit trail records, daily code calculation rules and 340

## B

- basic course search, performing 141
- basic student search, performing 235
- bell schedule periods
  - See also* bell schedules
  - adding 185
  - copying to other days 36, 187
  - deleting 185
  - editing 33, 185
  - setting up 33
- bell schedules
  - See also* bell schedule periods
  - about 184
  - data mapping and 33, 184
  - defined 20, 129
  - elementary 33
  - scheduling groups, deleting and 28, 172
- blocked classes, passing time 36, 187

## C

- capacity balancing constraints
  - See also* constraints
  - about 197
  - creating 202
  - student loader and 309
- capacity, homerooms 59
- change history, viewing 108
- change reasons 324
- changes effective dates, specifying 328
- class attribute rules, student loader and 310
- class load balancing rules, student loader and 309
- class loading rules, setting up 211
- class rosters
  - changing 114, 352
  - defined 129

- viewing 111, 349
- class schedules, defined 129
- class scheduling options, defining 265
- class sequencing rules, student loader and 309
- class size, adjusting 269
- classes
  - changing for multiple students 242
  - combining 292
  - constraints
    - about 45, 197
    - Apply Constraints page, applying from 56
    - applying, overview 56
    - Class Setup page, applying from 78
    - creating 45, 198, 202
    - Master Schedule page, applying from 284
    - overriding 87, 307
  - copying settings 293
  - courses
    - assigning 285
    - number required for 281
  - creating for coming year 274
  - default, assigning and reassigning 102
  - defined 19, 128
  - homeroom and 20
  - locking 291
  - meeting patterns 284
  - meeting times 27
  - passing time 36, 187
  - rooms, assigning to 290
  - rosters
    - changing 114, 352
  - scheduling 71, 285
  - scheduling for students 329
  - size limits 147, 269
  - split, creating homeroom for 59
  - student schedules, adding to 103
  - students
    - assigning to 87
    - balancing across 309
    - transferring 90, 114, 352
  - subjects, creating for 64
  - teacher loads, clearing from 281
  - teachers
    - allocating to 277
    - assigning to 289
  - teams, assigned to 221
- classrooms. *See* rooms
- columns, custom display options 239
- combined classes 292
- conflict matrix
  - course requests, about analyzing 267
  - overview 267
  - using 272

- conflicts, avoiding in student schedules 310
  - constraints
    - about 45, 197
    - applying
      - from Apply Constraints page 56
      - from Class Setup page 78
      - from Homeroom Details page 60
      - from Master Schedule page 284
      - overview 56
    - creating 45, 198, 202
    - eligibility control, working with 51, 205
    - overriding 87, 307
    - program, setting 201
    - student loader and 309
  - contiguous periods, defining 8
  - core subjects
    - about scheduling 65
    - adding 66
    - scheduling example 66
  - course catalog
    - see *also* subject framework; subjects; courses
    - course detail page 147
    - scheduling load 146
    - terminology 128
  - course load balancing rules, defining 217
  - course preferences, teachers 132
  - course request tally 267
    - analyzing course requests, about 267
    - using 268
  - course requests
    - about 247
    - analyzing 267, 269
    - changing for multiple students 253
    - copying to other students 256
    - deleting for students 253
    - individual students, assigning to 247
    - Notepad, using to assign 251
    - planning schedules and 169
    - priority 326
    - saved lists, using to assign 259, 260
    - unscheduled and student loader options 308
  - course sequencing rules, defining 214
  - courses
    - see *also* course catalog; subject framework; subjects
    - about 140
    - attendance, collecting 148
    - classes
      - assigning 285
      - number required 281
    - defined 128
    - doubleton 273
    - required vs. elective 148
    - saved list, creating 259
    - scheduling load 146
    - searching for 140
    - semesters, balancing across 211
    - sequence, controlling 211
    - singleton 273
    - study hall 148
    - teacher loads, clearing from 281
    - teacher preferences 279
    - teachers, eligible 279
    - terminology 128
  - custom display options 239
  - cycle of days 128
- D**
- daily code calculation rules
    - audit trail records 340
    - deleting term sets and 174
  - data mapping
    - bell schedule restrictions 27
    - periods and 34, 186
    - scheduling restrictions 13, 33, 184
    - special days and 29, 176, 180
  - day patterns
    - about 176
    - applying relative 31, 179
    - days-of-the-week 30, 177
    - defined 19, 128
    - setting up 29, 176–178
  - days, deleting from schedule 31, 178
  - days-of-the-week day patterns 30, 177
  - default classes, assigning and reassigning 102
  - detailed course search, performing 143
  - detailed student search, performing 235
  - display options
    - custom 91, 239
    - sorting columns 239, 240
  - documentation included 1
  - doubleton courses 273
- E**
- elementary scheduling
    - overview 16
    - terminology 19
  - elementary scheduling method
    - about 6
    - selecting 7
  - eligibility control
    - rules, creating 55, 209
    - statement builder 52, 206
    - working with 51, 205
  - eligibility rules
    - creating 55, 209
    - null or empty values and 55, 210
  - empty values, eligibility rules and 55, 210
  - exception days
    - see *also* special days
    - defined 129
  - exceptions, subject
    - grading, impact on 106
    - scheduling for students 106
  - extended school days, scheduling students in



156, 159

**G**

grade levels  
 homerooms and subjects 20  
 subjects, assigning to 26

grades, transferring  
 about 334  
 examples 338  
 options for 335

grading, subject exceptions and 106

guides included with Chancery SMS 1

**H**

help, getting 1

homeroom rosters, changing 114, 118, 352, 355

homerooms  
 assigning to multiple students 244  
 capacity 59  
 constraints  
 about 45, 197  
 Apply Constraints page, applying from 56  
 applying, overview 56  
 creating 45  
 Homeroom Details page, applying from 60  
 overriding 87  
 defined 19  
 grade level and 20  
 list of, printing 62  
 setting up 59  
 split classes 59  
 students  
 assigning to 87  
 transferring 104, 114, 118, 352, 355

**I**

inclusion format, resource services 93, 313

incoming students  
 defined 231  
 displaying 89  
 hiding 234, 235, 238

instructional minutes  
 data mapping and 184  
 tracking in elementary schools 27

instructional time, in periods 36, 187

**L**

locks, class 291

lunch periods  
 about 294  
 regular period example 294  
 split configuration example 298

**M**

Mac School, scheduling options 5

master schedule  
 class loading rules and 211

creating 265, 285  
 defined 129  
 student loading rules and 197  
 unable to create 197

Master Schedule page, about 282

meeting patterns  
 classes, assigning to 284  
 defined 20, 128  
 scheduling groups, deleting and 28, 172  
 setting up 39, 190

middle schools, scheduling scenarios 123

**N**

Notepad  
 course requests, assigning with 251

null values, eligibility rules and 55, 210

**P**

passing time  
 contiguous periods and 8  
 setting for blocked classes 36, 187

periods  
 attendance calculation rules and 35  
 bell schedules, adding to 185  
 contiguous, defining 8  
 copying  
 to other days 36, 187  
 to scheduling groups 38, 189  
 data mapping and 33, 184  
 defined 128  
 deleting 185  
 editing 33, 185  
 instructional time, setting 36, 187  
 meeting patterns, used by 190  
 setting up 33

permissions, scheduling 17

placeholder teachers  
 about 132  
 converting to staff 138  
 creating  
 from Staff List page 136  
 from Teacher Allocation page 276

planning calendars  
 See *also* planning schedules  
 scheduling, using for 165  
 switching to 9

planning schedules  
 about 21, 165  
 creating 21, 165–168  
 deleting 168  
 name and description, changing 168  
 permissions required to change 165  
 structure, setting 171  
 switching and effect on course requests 169

priority, course requests 326  
program constraints, creating 201  
pull-out format, resource services 93, 313

## Q

quick student search 233

## R

reassign attendance  
    about 334  
    examples 338  
    options for 335  
records, opening student 10  
regular days, deleting 31  
regular-day patterns  
    deleting regular days 178  
    setting up 29, 176–178  
relative day patterns, applying 31, 179  
relative days, day patterns and 30, 178  
reservation labels  
    about 149  
    creating 150  
resource assignments  
    *See also* resource services  
    about 105  
    copying 96, 316  
    duplicating 96, 316  
    tracking 96, 316  
resource services  
    *See also* resource assignments  
    inclusion format 93, 313  
    multiple students, assigning to 94, 314  
    pull-out format 93, 313  
    setting up 93, 313  
    student, assign to single 107  
restriction constraints 45  
    *See also* constraints  
    about 197  
    creating 45, 198  
    student loader and 310  
room preferences, teacher 132  
rooms  
    classes, assigning to 290  
    defined 19  
    planning calendar, setting in 131  
    reserving periods 149  
    scheduling and 131  
    setting up 24  
rosters  
    changing 114, 118, 352, 355  
    defined 129  
    homeroom, building 87  
    number of 65  
    viewing class 111, 349  
rosters, class  
    changing 114, 352  
rules  
    attendance calculation, including periods in

    35, 186  
    class attribute 310  
    class load balancing 309  
    class loading 211  
    class sequencing 309  
    course balancing 214  
    course load balancing 217  
    course sequencing 213, 214  
    daily code calculation, deleting term sets and 174  
    priority in student loader 309  
    same/different attribute 213, 215  
    student loading  
        effect on master schedule builder 197  
        using 197  
    team loading rules 218

## S

same/different attribute rules, defining 215  
saved lists  
    courses, creating 259  
    creating new 241  
    deleting 242  
    search results 234  
    students, creating 240, 260  
    updating data 240  
schedule change reasons 324  
schedules, student  
    defined 129  
    deleting classes 104  
    loading 307, 310  
    opening  
        from search results 100, 322  
        from student demographics 99  
    unable to create 197  
    viewing 99, 321  
scheduling  
    overview 16  
    scenarios, middle and secondary schools 123  
    setting up subject 64  
    statistics, updating 16  
    terminology 19, 128  
scheduling conflicts, locating 267  
scheduling groups  
    active calendar, deleting and 172  
    bell schedules and 33, 184  
    changing 171  
    creating 171  
    defaults, editing 28  
    defined 19, 171  
    defining 27  
    deleting 171  
    periods, copying 38, 189  
    setting up 171  
scheduling load 146  
    course 146  
    FTE calculations and 280  
    maximum allowed 146

- staff restrictions 133, 137
- teacher allocations and 279
- teachers 132
- scheduling methods
  - about 6
  - selecting 7
- scheduling permissions 17
- scheduling structure 27
- search
  - AND/ OR parameters, using 236
  - basic student 231, 235
  - detailed student 231, 235
  - pre-defined 234
  - quick student 231, 233
  - saved lists 234
  - wildcards, using 238
- search results 231
  - custom display 91
  - saving to list 240
- secondary scheduling method
  - about 6
  - selecting 7
- secondary schools, scheduling scenarios 123
- singleton course 273
- software updates 4
- sort, student search results 92
- special days
  - see also* exception days
  - day patterns and 29, 176, 180
  - defined 129
  - deleting 31
- special-day patterns
  - deleting special days 178
  - setting up 29, 176–178
- specialty subjects, scheduling 65, 68, 69
- staff
  - See also* teachers
  - planning calendar, setting in 131
  - scheduling load restrictions 133, 137
  - scheduling properties, setting 132
  - scheduling, setting up for 132
- staff list, checking 23
- statement builder, eligibility control 52, 206
- statistics, updating 16
- Student Loader options
  - example 310
  - setting 307
  - Use Alternates 247
- Student Loader, class loading rules and 211
- student loading rules
  - master schedule builder, effect on 197
  - team overlap example 219
  - using 197
- Student Schedule page, about 322
- student schedules
  - change reasons 324
  - default classes, assigning and reassigning 102
  - defined 129
  - deleting classes 104
  - loading 307, 310
  - opening 99
  - overview 99
  - term overrides 325
  - term preferences 325
- student search results, sorting 92
- students
  - active
    - defined 231
    - displaying 89
  - alternate requests
    - adding for 247
    - changing for multiple students 253
    - deleting for 253
    - individual, assigning to 250
  - change history, viewing 108
  - class assignments, changing for multiple 242
  - classes
    - assign to 87
    - balancing across 309
    - scheduling for 329
    - transferring 90, 114, 352
  - course and alternate requests, about 247
  - course requests
    - changing for multiple 253
    - copying to other students 256
    - individual students, assigning to 247
    - Notepad, using to assign 251
    - planning schedules and 169
    - saved lists and 259, 260
  - course requests, deleting for 253
  - extended days, scheduling 156, 159
  - homerooms
    - assigning to 87
    - assigning to multiple 244
    - transferring 104, 114, 118, 352, 355
  - incoming
    - defined 231
    - displaying 89
    - hiding 234, 235, 238
  - loader options
    - example 310
    - setting 307
  - number in homeroom, setting 59
  - records, opening 10
  - re-scheduling to avoid conflicts example 310
  - reserving periods 149
  - resource services
    - assigning to multiple 94, 314
    - assigning to single 107
  - rosters
    - changing 114, 352
    - viewing 111, 349
  - saved lists, creating 240, 260
  - schedule changes, changes effective date and 328
  - schedules
    - classes, adding 103

- demographics, opening from 99
- search results, opening from 100, 322
- unable to create 197
- viewing 99, 321
- search results, custom display 91
- searching for 233, 235, 237
- subjects
  - automatically assigning 65
  - manually assigning 65
  - teacher meetings, scheduling 161
  - team teaching and 84
  - unscheduled course request and student loader options 308
  - withdrawn, hiding 234, 235, 238
- study hall courses 148
- study hall periods
  - about 302
  - number required 305
  - scheduling example 303
- subject exceptions
  - about 105
  - grading, impact on 106
  - student schedules, assigning to 106
- subject framework
  - reviewing 25
  - rosters 65
- subject scheduling
  - modifying 26
  - setting up 64
- subjects
  - adding 66
  - assigning, automatically 65
  - core, scheduling example 66
  - defined 19
  - grade level and 20
  - grade levels, assigning to 26
  - multiple grade assignments 129
  - rosters, number of 65
  - scheduling overview 62, 65
  - specialty, scheduling 68, 69
  - students, assigning to 65
  - teachers, assigning to 65
  - team teaching, configuring 65
- support web site 4

## T

- teacher schedule, defined 129
- teachers
  - See also* staff
  - adding 23
  - allocating, about 277
  - classes
    - allocating to 277
    - assigning 289
  - course preferences 132, 279
  - eligibility to teach courses 279
  - list of, checking 23
  - loads, clearing 281

- over-allocation percentage, setting 265
- placeholder
  - about 132
  - converting to staff 138
  - creating from Staff List page 136
  - creating from Teacher Allocation page 276
- prep periods, assigning 152, 154
- reserving periods 149
- room preferences 132
- student meetings, scheduling 161
- subjects, assigning to 65
- team teaching 83
- time restrictions 132
- team loading rules 218
  - adding teams 220
  - assigning teams to classes 221
  - deleting teams 221
  - editing teams 220
  - overlap example 219
- team overlap example 219
- team teaching
  - by teacher assignment 83
  - overview 83
  - scenarios 84
  - students, grouping by ability 84
- technical support 4
- term dates, copying 175
- term overrides, student schedules and 325
- term preferences
  - student loader and 310
  - student schedules and 325
- term sets
  - defined 128
  - overview 173
  - setting up 173
- time restrictions, teacher 132
- timetable, typical scheduling 123
- transfer grades
  - about 334
  - examples 338
  - options for 335

## U

- updates, software 4

## W

- web site, support 4
- wildcard searches 238
- Win School, scheduling options 5
- withdrawn students, hiding 234, 235, 238

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