Pre-Scheduling Guide

Release 10.1

“Education is a progressive discovery of our ignorance.”
~ Will Durant ~
## Version Control

<table>
<thead>
<tr>
<th>Release #</th>
<th>Revision #</th>
<th>Revision Date</th>
<th>Author or Editor</th>
<th>Summary of Changes</th>
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<tr>
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### DOCUMENT APPROVAL

**Reviewed By**

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**Approved By**

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<th>Name</th>
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<tr>
<td>Colleen Hycz</td>
<td>Manager</td>
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Introduction

Pre-Scheduling encompasses all the activities that are to be completed by your school prior to creating your Master Schedule for next year. These tasks must be completed in the order in which they are presented to ensure a successful experience within the Master Timetable Builder.

Objectives of Pre-Scheduling Training

Our goal is to help you prepare your school for scheduling. We will work through the various pre-scheduling activities to prepare the school tables, to set up courses being offered at the school, to explain various course selection entry methods and the reports used to analyze the course requests. You will be left with the assignment of completing the various tables, gathering and entering student course selections for Next Year using various methods (for example, Option Sheet Entry), and analyzing the data prior to scheduling training.
Navigating to the Screens

The menu paths listed throughout this document are for those users in Districts where the Advanced Menu system is in place. If you are in a District that is using the Role Based Menu, select the appropriate screen from your Role Based Menu.

School Set-up

School Details – SYS040

Path: School Menu > School Information > School Details (SYS040)

The School Details screen is composed of four separate canvases that contain information relevant to the Pre-Scheduling and Scheduling processes. Users may navigate to the different canvases by using the More Info menu or by using the Navigation arrows found in the bottom left-hand corner of each canvas.

Important: Do not modify this form if you are actively using eSIS in the Current school year. Changes may be made after Year-end Transition.

If NOT actively using eSIS in the current school year:

1. Select the appropriate days of the week that the school offers classes.
2. Select Courses in Use if you are scheduling courses.
3. Select Using Course Alternates if allowing students to make alternate course selections.

See School Setup documentation for details and specification information of remaining fields.

Select the button to navigate to the More School Details canvas.
The **Allow Teacher/Room Conflicts?** Option should be selected if your school has situations where classes that are **NOT** the same format/length need to be taught by the same teacher, in the same room, at the same time. If this scenario does not exist in your school, do not select this option.

**Note:** This option relates to scheduling courses/classes using the Course Section Maintenance screen in either Current or Next Year mode. You will only be able to combine courses that are of the same length/format within the Master Timetable Builder.

To proceed to the next canvas:

1. Select the button at the bottom left-hand side of the window to proceed to the **Current Year** window, or

2. Select the **Current Year** sub-menu item from the School Details > More Info menu.
School Details – Current Year

Important: Do not adjust information in the Current Year window if you are actively using eSIS in the current school year. If Tumble Patterns or Period Lengths, etc. require change for the next school year, adjustments should be made after Year-End Transition.

The fields along the top of the screen display your school’s Current Year setup.

- **Year field auto-populates from the system date and displays the starting year of the school year; e.g. Year 2005 for the school year 2005-2006.**
- **Semestered? checkbox should be enabled (✓) if your school is scheduling courses and / or using homerooms.**
- **Number of Semesters** tells eSIS how many semesters your school is using.
- **Number of Terms** indicates the number of terms within each semester in the **Number of Terms** field.
- **Enter** number of days it takes your school to cycle through all courses in the **Number of Days** field.
- **Maximum # of Periods** defines the number of periods in a day for your school. Depending on how your school operates this number can include before and / or after school courses as well as courses offered during the lunch periods.
- If you would like eSIS to schedule lunch periods for your students enable the **Use Lunch** checkbox and enter the applicable periods in the **Lunch Periods** column.
- **Use** the **Number of Tumble Patterns** table area to indicate the different patterns in which courses at your school are offered (see below for a detailed explanation of Tumble Patterns).
Tumble Patterns

Tumble Patterns (the way the periods “tumble”) are used to set up (order) scheduled periods in a variety of ways. For example, one week the school runs periods 1 through 6 in sequential order; however, the next week the periods reverse their order and are offered in the following pattern: 6, 5, 4, 3, 2, 1. Different Tumble Patterns may be created to accommodate Assembly Days, Day ‘0’s, etc.

Proper setup of the Tumble Patterns ensures that eSIS correctly tracks attendance for students. For example, a school alternates between the Tumble Patterns of 1, 2, 3, 4, 5, 6 and 6, 5, 4, 3, 2, 1 on a weekly basis. Last week, Mathematics, scheduled into Period 1, occurred in the first time period of the day. This week, Mathematics, which is still scheduled into Period 1, occurs in the last time period of the day.

If your school runs classes that fall outside of the normal school day but still require attendance records, then these must also be included in the Tumble Pattern. For example, if a ‘0’ period class runs before school everyday, then, using the school scenario from above, the school would indicate that 7 periods are used and, if classes are to appear on students’ schedules in the order in which they are taken, the tumble patterns would be as follows: 7, 1, 2, 3, 4, 5, 6 and 7, 6, 5, 4, 3, 2, 1.

Tumble Patterns can also be used as part of the scheduling process. An example using Tumble Patterns would be a school that runs with 8 periods - periods 1 to 4 today and periods 5 to 8 tomorrow. A ‘1’ would display in the Number of Days field, an ‘8’ would display in the Max # Periods field, and a ‘2’ would display in the Number of Tumble Patterns field (please refer to page 11 of this document for a note about using this method of scheduling). This same scenario can be scheduled using Days for a school that runs with 4 periods. Today would be Day 1 with periods 1 through 4 and tomorrow would be Day 2 with Periods 1 through 4. A ‘2’ would display in the Number of Days field, a ‘4’ would display in the Max # Periods field, and a ‘1’ would display in the Number of Tumble Patterns field. Many possible combinations exist so please consult all documentation and your District support staff before making any radical changes.

Note: After the Year End Transition process is completed by the District, each school must manually assign Days and Tumble Patterns to specific Calendar Days in the Attendance Module on the Attendance Tumbles screen as shown below.
Attendance > Period (or Daily) Attendance > Attendance Tumbles

Note: The Rebuild Calendar button should only be used at the start of the school year to build the initial table and when the School Start or End Dates have been modified in the School Schedule where the school year is now extended. The new dates will be added to Attendance Tumbles and the Day and Tumble will default to ‘1’ on these dates.

When it is necessary to make changes in the School Schedule to dates other than the School Start or End Dates; e.g. semester 1 end date and semester 2 start date, it is no longer necessary to Rebuild Attendance Tumbles. To adjust the records, make appropriate changes in the School Schedule and adjust Non-School Days accordingly. Changes to Non-School Days will automatically add or remove dates in Attendance Tumbles. For this reason, it is no longer necessary to rebuild the Attendance Tumbles.

Please refer to the section on School Schedule in this document for more information.
**Period Lengths**

**Note:** This information is not required for scheduling purposes but is discussed here to assist schools during their initial setup.

**Enter** the length of class periods in minutes. These values are used to calculate the total minutes for a student to determine his/her Full or Part Time status based on the business rules of the District. Once the values for each period are entered the **Re-Calc** button may be used to calculate the **Avg. Period Length**. This value will be used to determine the student’s total minutes on **STU541 – Student Course Selections**. If the **Avg. Period Length** is left blank, eSIS will use the actual value of the period as indicated in the **Period Length** column to determine the student’s total minutes.

1. **Click** the at the bottom left-hand side of the window to proceed to the **Next Year - School Details** canvas,

**OR**

2. **Select Next Year** from the More Info menu to proceed to the Next Year - **School Details** canvas.
School Details – Next Year

Current Year data will copy to the Next School Year block at the top of this window. Adjust as required for the next school year:

- **School Year** – should display the starting year of the next school year; e.g. Year 2006 for the school year 2006-2007.
- **Semestered?** – enable if you expect to use Courses or Homerooms.

**Note:** Determining Semesters, Terms, Days and Periods is the foundation on which the Master Timetable is created.

- **Number of Semesters** – The number of semesters being offered. Valid entries are 1-9. (1 implies that the semester runs the length of the entire school year)
- **Number of Terms** – The number of terms being offered within a single semester. Valid entries are 0, 2-9.
- **Number of Days** – The number of days used in your schedule. Valid entries are 1-9. (Values greater than 1 imply an alternating day schedule.)
- **Max Number of Periods** – The maximum number of periods being offered including periods for ‘before’ and ‘after’ school classes. Valid entries are 1-99.
- **Use Lunch** – Indicates that eSIS is to leave an open period as specified from Lunch Periods.
- **Lunch Periods** – The periods that are available for lunch. (If values are not null ‘Use Lunch’ is enabled.)

**Note:** The information contained in the Next School Year block will be copied into each Master Timetable Building session; however, changes may be made within the Master Timetable Builder upon creation of a new session.
**Staff Master Timetable Builder Defaults**

The constraints set in the **Staff Master Timetable Builder Defaults** block are carried over to the Master Timetable Builder during the creation of an MTB session. The builder uses these defaults when assigning teachers to various classes.

**Note:** Overrides can be set for an individual teacher in Staff Details > Timetabling Options.

Enter the appropriate numbers in each of the following fields:

- **Maximum # of Classes Per Day** – The total number of classes a teacher may be scheduled for in a given school day.
- **Maximum # of Periods in a Row** – The total number of consecutive course sections that a teacher may be scheduled for in a given school day.
- **Maximum Unique Courses/Year** – The total number of unique course codes that a teacher may be scheduled for within the school year.

**Note:** Schools that schedule alternating day classes using a different period to differentiate the day (for example, a ‘1’ day schedule has been set up but the school is using two different Tumble Patterns, running periods 1 – 4 on one day and 5 – 8 the next day) **cannot** use the ‘Maximum # of Classes in a Row’ default, as the MTB sees the periods in one consecutive string.
School Schedule

Path: School Menu > School Information > Schedule (SCH099)

Data entered on this form is referenced by various functions within the application, e.g. attendance, reporting period start dates, course section maintenance start and end dates.

It is necessary to have completed the School Schedule prior to completion of the new Master Timetable for next year. The appropriate Start and End Dates are copied to each course section record on creation of the new Master Timetable.

The Copy button on the Current Year canvas provides the ability to copy the existing Current Year schedule to Next Year. The functionality adds one to the year of each record. Additions and alterations of records can then be made as needed on the Next Year canvas.

1. Select the Next year radio button.

2. Enter or adjust the appropriate Start and End Dates for each semester and / or term in the School Schedule.

Note: The example above displays a school offering full year courses, semester courses, and term courses. Semester 0 represents the full year. Term 0 represents the full semester. Bronze Land High School has set up two terms within each of the two semesters.

Important Note: The rules for the School Schedule screen are as follows:

- In Current Year, you are unable to modify or create a Schedule start date for today’s date or earlier.
- In Current or Next Year, No Semester or Term dates can fall outside the date range specified in your Semester '0' row.
In Current or Next Year, No Term date can fall outside the start and end date range of its corresponding Semester.

In both Current and Next Year, Semester Start and End dates will automatically populate to the Term '0' Start and End dates.

In both Current and Next Year, when creating Terms within a Semester, the Semester Start and End dates will automatically populate for each Term record entered.

In Current Year, you are unable to delete any row from your schedule. In Next Year, you will be able to delete and/or make modifications to any date.

If attendance exists for future Semester or Term date, you will not be able to modify that date until the attendance information for that date is removed.

When extending, or reducing, a future date range, attendance validation will take place for the dates found between, but not including, the previous Start or End Date and the new Start or End date.

Logic is in place to prevent you from modifying a Semester '0' record to the point where the End Date of Semester '0' is earlier than the Start Date of a Semester and/or Term, eSIS will modify the appropriate End Dates to correspond with the End Dates of Semester '0'.

Because of this functionality, it is imperative that schools finalize their schedules for Next Year prior to the running of YET. If that is not possible, due to District happenings, it must be set before the first day of the new school year. Once that date has been passed, you will not be able to update the Start date. Any future dates may still be changed, if necessary.

**Note:** The Rebuild Calendar button should only be used at the start of the school year to build the initial table and when the School Start or End Dates have been modified in the School Schedule where the school year is now extended. The new dates will be added to Attendance Tumbles and the Day and Tumble will default to '1' on these dates.

When necessary to make changes in the School Schedule to dates other than the School Start or End Dates; eg. Semester 1 end date and semester 2 start date, it is no longer necessary to Rebuild Attendance Tumbles. To adjust the records, make appropriate changes in the School Schedule and adjust Non-School Days accordingly. Changes to Non-School Days will automatically add or remove dates in Attendance Tumbles. For this reason, it is no longer necessary to rebuild the Attendance Tumbles.
Course Lengths and Formats

Path: School Menu > School Information > School Details > More Info Menu > Course Lengths and Formats (SYS581)

The Course Lengths and Formats form is used to match District-defined Course Lengths to the application-defined Course Formats at the school level. This table is used in Course Maintenance to prevent mismatched records and in determining Course Length Start Dates.

1. Select the Next year radio button.

2. Enter a unique Number for the first record; select an appropriate Course Length from the Course Lengths drop-down list and a corresponding Course Format from the Course Formats drop-down list.

3. Continue entering appropriate records for each Course Length being offered for the next school year.

Note: A Course Length value may be selected more than once if the school set-up includes alternating days (as is shown in records 1, 2 and 3, 4 above).
Course Start Dates

Path: School Menu > School Information > School Details > More Info Menu > Course Start Dates (SYS585)

The Course Length list of values is generated from the 'Course Lengths and Formats' form. The Course Start Date records are the Start dates that will be used (populated) in 'Reporting Periods'.

1. Select the Next year radio button.
2. Select a Course Length from the Course Length drop-down list.
3. Select a date from the list of values (the LOV displays all Term Start Dates as previously entered the School Schedule step).
4. Enter an Ext. Code, if necessary.
5. Continue to ADD appropriate Start Dates for each Course Length.

Note: In the example above, Bronze Land High School displays a Course Length of 9 Weeks that in turn carries four records; one for the start of each of the four terms throughout the school year. The Course Length of 18 Weeks carries two records, one for the start of each of the semester throughout the school year. As well, a Course Length of 36 Weeks carries one record for the start of the school year.
Grades and Catchments

Path: School Menu > School Information > School Details > More Info Menu > Grades and Catchments (SYS041)

The Next Year Grades Taught table is used in determining the Grade Level field in Course Maintenance records for next year.

1. Select the Next Year tab.

2. Though not required for scheduling purposes, in the Next Year Associated Catchments block, click the Copy from Current button to copy Catchments from the current to the next year. Update as appropriate using the Add and / or Delete buttons.

3. In the Next Year Grades Taught block, click the Copy from Current button to copy Grades Taught from current to next year. Update as appropriate using the Add and / or Delete buttons.

4. If all courses in a particular Course Grade Level are unavailable to be taught in a specific period, select the button from the Unavailable Periods column and enter the appropriate Period(s). The constraints set up here are carried over to the ‘Update Course Availability’ window during the creation of a Master Timetable Building session.

5. Indicate the Last Grade at School. This information will be used in the Pre-transition and Year End Transition procedures.

6. Grandfathered – If School Catchments change from the current to the next school year, specific grade levels may be “grandfathered” to allow students to continue attending the school even though they may be living outside of the school boundaries. This functionality is used in determination of Next Year’s Enrolment function found in System Setup Utilities. Note: When you copy grades from the Current to the Next Year, all grades default to Grandfathered.
Period Start and End Times

Path: School Menu > School Information > School Details > More Info Menu > Period Start and End Times (SCH105)

Note: This information is not required for scheduling purposes but is discussed here to assist schools during initial setup. If your school is using eSIS in the Current Year, changes made to Period Start and End Times must be done AFTER Year End Transition. If your school is not running periods, the information on this screen may be left blank.

Period Start and End Times can be entered so that schools may take advantage of the eSIS Find Student Function. Period Start and End Times can be the same for all grades or can be set up for individual grades. The Period number, the Start time and the End time are connected to the Period/Tumble Pattern setup in School Details and the Tumble Pattern assigned to a specific date so that eSIS will know what class and room the student is in at any given time.

To add a Period Start and End Time:

1. Click the ADD button.
2. Enter the Period number, the Period Start Time and the Period End Time.
3. Click the button.

To add a Period Start and End Time for a specific grade, select the grade from the Query Grades pull down menu and repeat the steps described above.

When All is selected in the Query Grades field, all Period Start and End Times will be listed for all grades. The grade associated with a specific Start and End Time will display in the Grade column.

To delete a Period Start and End Time:

1. Select the Period Start and End Time to be deleted.
2. Click the DEL button.
3. Click the button.
Non School Days

Path: School Menu > School Information > Non School Days (SCH215)

This screen is used to track the days for which no classes will be offered. The days can be holidays, staff development days, school closings due to weather, etc.

Note: This information is not required for scheduling purposes but is discussed here so that schools wishing to complete this task may do so now rather than later.

To add a Non School Day:

1. Click the ADD button.
2. Enter the calendar date of the Non School Day.
3. Select a Reason from the pull down menu.
4. Click the button.

To delete a Non School Day:

1. Highlight the Non School Day to be deleted.
2. Click the DEL button.
3. Click the button.
4. **Select** the button to generate the report illustrated below showing all Non School Days for the school.

<table>
<thead>
<tr>
<th>Date</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>19 SEP 2004</td>
<td>Labor Day</td>
</tr>
<tr>
<td>18 OCT 2004</td>
<td>End of Quarter</td>
</tr>
<tr>
<td>23 OCT 2004</td>
<td>Conferences</td>
</tr>
<tr>
<td>24 NOV 2004</td>
<td>Thanksgiving Vac</td>
</tr>
<tr>
<td>25 NOV 2004</td>
<td>Thanksgiving Vac</td>
</tr>
<tr>
<td>25 DEC 2004</td>
<td>Winter Break</td>
</tr>
<tr>
<td>26 DEC 2004</td>
<td>Winter Break</td>
</tr>
<tr>
<td>27 DEC 2004</td>
<td>Winter Break</td>
</tr>
</tbody>
</table>

To copy Non School Days to other schools:

1. **Select** the button. The following window appears.

2. **Select** from the pull down menu a School Type to which the Non School Days are to be copied or leave blank to copy to all School Types.

3. **Click** the button to complete the copy process.
**Reporting Periods**

**Path:** School Menu > School Information > Reporting Periods (SCH100)

Although it is not necessary to create Reporting Periods prior to Scheduling for next year, it is a good idea to do so while setting up related information in the School menu. **Note:** If you wish to set up Reporting Periods at this time, please refer to the School Setup or Teacher Assistant documentation.

An unlimited number of Reporting Periods may be assigned to each Course Length and Start Date. The Reporting Periods are used in Mark Entry.

**Departments**

**Path:** School Menu > School Information > Departments (SCH090)

Department is a **required** field in Course Maintenance and is used in the Master Timetable Builder to sort course records by Department. **Ensure** all Department codes are up to date.

To Add a Department:

1. **Enter** a unique **Code** for each Department.
2. **Enter** a **Description** for the Department.
3. **Assign** a **Department Category Code** from the drop-down list of values, if applicable.

**Note:** Departments may be copied from one School to all Schools in the District based on School Type.
Rooms

Path: School Menu > School Information > Rooms (SCH030)

The Room Maintenance table is used in both the current and next school years. New rooms may be added in preparation for the next school year’s schedule. Rooms that will no longer be used next year may not be removed from this table until after Year-End Transition.

To Add a Room:

1. Add new rooms by entering a unique Code and Long Name (description).
2. Enter the room Capacity, based on Fire Regulations. This number is NOT related to the maximum class size used in Scheduling, Course Maintenance and Course Section Maintenance.
3. Attach a Room Type from the drop-down list, if applicable.

Note: If the same room is used for multiple classes in the same scheduling slot, the Gym for example, create multiple rooms to prevent conflicts in the Master Timetable Builder e.g. GymA, GymB, GymC, etc.
Staff Maintenance

Path: School Menu > School Information > Staff Maintenance (SCH040)

In preparation for scheduling for the next school year, it is necessary to copy the current year Staff Maintenance file to next year.

To Copy Staff from Current to Next year:

1. From the Current year, select the All Staff radio button.
2. Select the Next year radio button.
   A message will display "Copy currently displayed staff to next school year?" Select 'Yes'. (This only occurs when there are no staff records in current year). The next time you copy from current to next year you will have the option to select 'Yes' or 'No'.
   - If you select "Yes" you will receive the message "Some data already exists for the base table for year 200X. Continue to copy? This inserts new staff records that have been created in the current year.
   - If you select "No" than any new staff records that have been created in the current year will remain in the current year.

   Note: This will inserts newly created records; it will not update existing records.

3. Update the staff file for the Next school year by adding new staff and deleting staff that will not be returning next year.

   Note: Timetabling Options that exist for a staff member in Current Year are copied to Next Year. Remember to update each staff member if Timetabling Options are to change for Next Year.
To Add a new staff member:

1. **Click** the ADD button.
2. **Enter** a unique three-digit code in the **Initials** column. This column may contain alpha and/or numeric codes. Enter the **Name** of the teacher. The SSN is not a required field.

**Note:** It is advisable to enter names in the format: Surname, First Name.

3. The **ID** is generated automatically by the system.
4. If the staff member is paid by another District, click the checkbox and select the District from the list of values.

5. **Select** the button to save. Additional information may be entered in Staff Details.

**Note:** if the District has determined that the Gender is a required field in Staff Maintenance, when the ADD button is selected, the Staff Details canvas will be displayed to allow entry of the required Gender.

To Delete a staff member:

1. **Select** the record to be deleted.
2. **Click** the DEL button. **It is not possible to delete staff members who have been assigned to a class or a homeroom within the selected year.**

3. **Click** the button to save.
Staff Details

Path: School Menu > School Information > Staff Maintenance > Staff Details button (SCH044)

Enter as much basic demographic and emergency contact information as is applicable for your School/District. The required fields are Name and Code.

- The **Assigned Room** field is useful when scheduling for next year. If assigned, this room will be used as a default for each class the teacher is assigned to teach.

**Note:** The default may be changed in the Master Timetable Builder for an individual class. While not necessary for scheduling purposes schools can track the following information:

- **Teacher Qualifications & Licensing** may be added by selecting the Qualifications button.
- **Staff Roles and Percent of Time** may be added by selecting the Staff Roles button.
Timetabling Options

Select the Timetabling Options button from Staff Details to update or view the Unavailability/Timetabling Options window. If you have copied staff from Current to Next Year, this window will display the data that existed for the staff member in Current Year. Adjust timetabling options and periods of unavailability for Next Year, as required.

1. Enter Overrides to the Staff Master Timetable Builder Defaults set in School Details > Next Year for a particular teacher.

Note: Values only need to be entered if you wish to override the defaults set on the Next Year canvas of School Details. If these teacher values are left null, the school specified value still applies.

2. Enter the specific timeframes and reason why a particular teacher is Unavailable to teach.

Note: These constraints populate to the ‘Update Teacher Timetable’ window during the creation of a Master Timetable Building session.
Home Rooms

Path: School Menu > School Information > Home Room Maintenance (SCH120)

Note: Although it is not necessary to create the Home Room Maintenance List for the next school year prior to scheduling, users commonly do so while in the school setup phase as Home Rooms may be used to mass assign students to a particular course or section. It is possible to copy current year homerooms to next year.

- While in Current Year, click the Next Year radio button to copy Home Rooms to Next Year.

- You will be required to enter a default value for a teacher. This value will be used to populate any teacher field on the Next Year Homeroom Maintenance screen, where a teacher assigned to a current Homeroom has been removed from the Next Year Staff Maintenance screen. When the copy process has completed, update each Homeroom record (where the default teacher was applied) with the appropriate staff name.
Fee Management

Path: School > Fee Management > Student Fee Codes (SCH077)

If you are currently using Course Fees you MUST copy Fees from Current to Next year prior to using the ‘Copy Courses’ function (discussed later in this document). Warning messages are generated when attempting to Copy Courses to Next Year if the Fee Codes file has not been generated for next year. However, courses will be copied forward without the attached fees and you will need to again add the fees to the applicable courses. Please consult the Fees and Assistance Features and Functions Guide for detailed setup instructions.

1. To copy fees from the Current school year to Next year, click the Copy Fees button.

Note: this will replace any student fees already entered in next year.

2. In Next year, adjust any records that will be changed from the current year.
Copy Teams and Groups

**Path:** School > School Information > Teams and Groups (SCH091)

If you intend to enter options based on Teams or Groups, current Teams and Groups may be copied to Next year or new Teams or Groups may be set up on the Next year canvas. Please consult the Teams/Groups Features and Functions Guide for detailed setup instructions.

1. **In Current Year,** click the **Copy Teams** button.

2. To copy members of a team from one year to the next, **select** the team in Current Year and click the Members button. When the team and the members appear, **select Next Year** and the following screen appears. **Select Yes** to copy members.
3. The Team/Group Membership screen appears with all the members selected. Make any necessary adjustments and **click** the Apply button.

4. You can also adjust any records that will be changed from the current year in Next Year.

5. **Select** the appropriate team or group on the Team/Group Maintenance screen and **click** the Members button. Add or delete members as required.
Course Management

Copy Courses to Next School Year

Path: School Menu > Option Sheet > Copy Courses to Next School Year (SCH056)

It is necessary to create the Course Maintenance (Course Catalogue) file for your school for the next school year. It is possible to copy a file from a previous year and to update this copy for Next year.

1. Select the appropriate year for the Course Maintenance file you wish to copy from the Available Years to Copy From drop-down list.

2. Verify that the Next School Year displayed is accurate.

3. Click the Copy button. A list of Courses for next year will display.

Note:

- Courses containing an End Date (in Standard Courses) before the current year-end date will not be copied.

- Warning messages are generated when attempting to Copy Courses to Next Year if the Fee Codes file has not been generated for next year. Courses are copied forward without the attached fees and all course fees will need to be attached again.

- Courses set up at School Level that does not match the Standard Course Code will not be copied over to Next Year. Example: Course 003HSTGUID is setup at school level on SCH050. It does not match the standard course code 003HOST in the System Code. On SCH056 (Copy Courses to Next Year), when the Copy button is selected, this course will not get copied over to Next Year.
4. Select the button to print the Courses Not Copied report – SCH056R.
Courses for Next Year

The Courses for Next Year window will display when the Copy function has completed. You may also access this screen from the See Courses button on the Copy Courses to Next School Year window.

1. It is possible to delete courses not being offered next year. Select the course and click the DEL button.

2. Select the button to save the transaction.

3. Select the Back button to return to the previous screen.

Note: It is recommended that you use Next Year Course Maintenance to delete a course as you are able view more details about the course. You will also be able to add any new courses that are to be offered at the school next year.
Course Maintenance – Next Year

Path: School Menu > Course Information > Course Maintenance (SCH050)

Following the ‘Copy Courses to Next School Year’ process, the Course Maintenance file is available for update for the Next school year.

1. Select the Next year radio button. If you have copied courses from Current year, query courses that require any changes.

2. To add a new course, click the List ADD button. The following screen appears.

3. Highlight the required course and click the Select button. You will return to the Course Maintenance screen.

4. Press the Tab key on your keyboard to populate fields with information contained in Standard Courses.

Note: If ‘Enforce Standard Courses’ is enabled in the Company File, a school may not adjust data populated from Standard Courses. If not turned on, update is allowed. In either case, null fields can be updated.
5. Add/change information as required.

The following fields are required for scheduling purposes:

- Course Code and Title. Note: If the district is allowing schools to add suffixes to the Standard Course Code, the suffix **must be added prior to saving.**
- Option number (if null, generated by the application on a Save)
- Grade Level – the grade at which the course is first taught
- Course Length
- Department
- Format – must match Course Length as defined in Course Lengths and Format table
- Max Sec/Per – defaults to 1, maximum 99
- Consecutive Periods – defaults to 1
- Max Class Size – cannot be null or zero

Although not required, the following fields may be useful in the scheduling process:

- Default Sem - will carry into MTB session.
- Gender Restr(iction) – at this time, for informational purposes only.
- Min Class Size – used in reporting courses below minimum.
- Preferred Loading – used to alter the order of the selected course for simulation purposes. Choices are Before Singles, Before Doubles, After Doubles, After Triples or After Quads.
- Option Sheet checkbox – turn on to indicate the selected course should appear on the Option Sheet. If you wish to use the option to Preprint Students' Course Selections on the Option Sheet, you must enable this checkbox.
- Study Hall checkbox – turn on to indicate the selected course is to populate to the Study Hall Builder. Used once the timetabling process is complete.
- Do Not Replace By Global Alternate – enable to prevent this course from being replaced by a Global Alternate during simulation.

1. **Remember**, if you need to add additional characters to the end of the Standard Course Code, do so **NOW**.

2. **Select** the button to save the transaction.

3. **Select** the More button to navigate to the Course Maintenance - More screen.
Course Maintenance – More Screen

- **Prerequisite Courses** – enter the course(s) that are required to be taken prior to the selected Course. The current number of Students Taking the prerequisite course will populate automatically. In determining if Prerequisites have been met, the system will look to a student’s history for a passing grade in Student Credit Detail. In Current Year, eSIS will look for a passing grade if any final grades have been issued. A prerequisite course in Current Year with no final grade is treated as a pass. If, when simulating on Student Course Selections – STU541, failing grades are found, prerequisites have not been met and the simulator will return a “soft warning”. During a Mass Simulation, students found to have not met Prerequisite requirements will populate to School Menu > Scheduling Utilities > Students Missing Prerequisites.

**Note:** A conflict will occur during simulation if a student is requesting both the selected course and the prerequisite course within the same school year and the prerequisite cannot be scheduled before the selected course.

- **Schedule Before Courses** – The selected course (top of screen) must be scheduled before the course(s) listed in the Schedule Before Courses field(s).

  If **Enforce** = Y, a conflict will occur if the student’s courses cannot be scheduled in this manner. Such a situation will require manual adjustment to either the Master Timetable or the student’s individual timetable. If **Enforce** = N, the simulator will schedule the courses to give the student the best possible timetable.

- **Co-requisite Courses** – the Co-requisite course(s) must be scheduled in the same semester and/or term in the student’s schedule.

- **Schedule Opposite Courses** – the Schedule Opposite course(s) must be scheduled in opposite semesters or terms from the selected course in the student’s schedule.

- **Anti-requisite Courses** – if the student has taken the Anti-requisite course listed, a conflict will occur if an attempt is made to schedule the selected course.

  **Note:** In the above areas, if multiple courses are listed, an ‘OR’ condition exists, not an ‘AND’ condition.

- **Course Fees** – a Fee and an amount may be entered.
Course Exploding

Exploding Courses allows you to enter a single course code for a student that will automatically expand into multiple (more than one) subordinate courses. The subordinate courses will be selected from the School’s Course Maintenance file through the List of Values in the More screen. Two types of exploding courses are available:

- **Explode After Simulation** – students will receive the same set of courses and will travel as a group from class to class.
- **Explode Before Simulation** – students will receive the same set of courses but will not travel together from class to class. **Note:** This same effect can be achieved by using the Mass Entry of Courses functionality, which is the recommended method.

**Keep Host Course** – select if you wish to keep the host course following the exploding of the subordinate courses. This allows for grading to occur on the host course as well as the subordinate courses.

- If Keep Host Course is selected, you must select a How Taken After code from the drop-down list. The host and subordinate courses would be in conflict if all were left with a How Taken code of Day School.
- If Keep Host Course is selected, you may choose to Keep Host Course Credit. Final credit will be awarded to the host course as opposed to the subordinate courses.
Exploding Courses (After Simulation)

The purpose of Exploding Courses (After Simulation) is to group students together in multiple classes. The students will travel together from one class to the next as a group. Create a ‘Host’ course (‘dummy’ course code) to hold all subordinate courses (the ‘true’ course codes) together.

In Course Maintenance:

1. **Add** a Host course. You may need to add a digit to the end of an existing course code to identify the course as a Host.

2. **Add** each of the ‘true,’ subordinate courses to Course Maintenance (the courses into which the Host will eventually explode).

3. **Query** for the Host course. **Go** to the ‘More’ screen using the button at the bottom of Course Maintenance. In the Exploding Courses block, **select** each of the subordinate courses into which the Host will eventually explode.

   **Note:** you cannot ‘explode’ an exploding course; e.g. a subordinate course cannot be a ‘Host’ in another record.

4. The **Create Schedule** and **Sem** and **Term** columns may be used in certain situations. The purpose of Create Schedule and Sem/Term is to aid in the creation of the section records in the Master Timetable. The Host course sections will have been scheduled to certain periods. Matching section records of the subordinate courses are required to keep the students together in each class. These section records can be created automatically when the Course Section Maintenance file for next year is created from an MTB session or from the Course Explodes screen – SCH011. This function can only be used when the subordinate courses are to be placed in a specific sequence across the period held (or reserved) by the Host course. The section records may have to be created manually when other conditions occur.
See below for the various scenarios:

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Use ‘Create Schedule’ and ‘Sem/Term’</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students attend a class all year, but the school wishes to give final grade at each semester. In this case, a host course is created as the overall Full Year course and each Semester course is attached as subordinate courses. (This same scenario applies when a Full Semester course is set to explode to multiple Term courses.)</td>
<td>Yes – list the sequence of the semester classes. These classes will always be taken in this order.</td>
</tr>
<tr>
<td>Students take two or more of their classes together; e.g. LA/SS or MA/SC. Again, a Host course is required to group all courses that are to be linked.</td>
<td>No – when multiple courses may be scheduled in multiple periods, Create Schedule functionality cannot be used. The Host course will be set to hold the multiple periods required to explode to the individual courses and periods. The section records for the subordinate courses will have to be created manually.</td>
</tr>
<tr>
<td>Students take a series of courses in a ‘Wheel’ or ‘Rotation’ across a period and remain together through each part; e.g. Music/Drama/Tech/Comp.</td>
<td>No – in this situation, normally one group of students will begin in Music, another in Drama, another in Tech, etc. In this case, the order of the classes is different for each section created; therefore ‘Create Schedule’ cannot be used.</td>
</tr>
<tr>
<td>Students attend a class all year, but the school wishes to give final grade at each term. This particular school has full year, semester and term courses. The Host course (Full Year) will explode to a series of term courses.</td>
<td>Yes – List the sequence of the Term classes, indicating the specific Semester and Term in which the class will run. These classes will always be taken in this order.</td>
</tr>
</tbody>
</table>
Course Verify Report (SCH420P/R)

This report provides a core listing of course maintenance entries. It can be used to verify the setup of your courses.

<table>
<thead>
<tr>
<th>Department</th>
<th>Computer Science</th>
<th>Sub-Dept.</th>
<th>Course Title</th>
<th>SCH420 Keyboarding 4</th>
<th>Course Type</th>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>Option</td>
<td>100</td>
<td>Level</td>
<td>12</td>
<td>Credit</td>
<td>1.00</td>
<td>Hours</td>
</tr>
<tr>
<td>Short Name</td>
<td>Keyboard 4</td>
<td>Course Length</td>
<td>9 Weeks</td>
<td>Min Class</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Prerequisites</td>
<td>1</td>
<td>Default Semester</td>
<td>Pref. Lead</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Length of Inst</td>
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<td>Tassel Max PTC</td>
<td>/</td>
<td></td>
</tr>
<tr>
<td>Format</td>
<td>Full Time</td>
<td>GPA Manipulation</td>
<td>0.00</td>
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<td></td>
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<tr>
<td>Max Sec/Per</td>
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Narrative

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<tr>
<td>Option</td>
<td>120</td>
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Pre-Transition of Students from Feeder Schools

Path: School Menu > Pre transition > Do Transition (STU590)

All schools in the District must perform Pre-transition (unless the district is using Determine Next Year’s Enrollments, which means that schools will not be setting the Next Grade or School). This functionality affects groups of students in different ways. Students remaining in the school will have their Next Grade set. Students transitioning to a new school for next year will have both their Next Grade and Next School set. In this case, Cross Enrollment records are automatically created for the transitioning students. This cross enrollment record gives the ‘receiving’ school the ability to enter course selections for next year.

Do Pre-Transition

When the school first enters the Do Transition window, Defaults will display if the Next School has been set in School Details.

Elementary and Middle Schools Only (High Schools – see below for details)

1. The first time Do Pre-Transition is processed, run it for all the students in your school by selecting the All Students radio button.

2. Set the Next School field to your school. For example, Olive Morgan Middle School will set the Next School to be Olive Morgan Middle School (as shown in the screen shot below).

3. The Admission Date field may automatically populate based on the School Schedule for next year. If not, manually enter the date (usually the first day of school for next year).

4. Select the appropriate Admission Code. In this case, where students are remaining at the same school, the Admission code will not affect enrolment records but is a required entry for this process. If the students are leaving the school (for example, the 8th grade students moving to another school for 9th grade) then the YET process may use the Adm. Date and Adm. Code used here.

5. If applicable, select the Withdraw Code. If this code is used in either Do Pre-transition - STU590 or the Pre-transition List - STU591, it will be used during the Year End Transition (YET) process should the student be withdrawing from the school. If this field is not used at this time, the Withdraw Code will be set during YET process. Please consult your District staff for additional information.

Note: If the Current School and the Next School are the same, you will not be able to select a Default Withdraw Code.
1. **Select** the **Apply** button.

2. The second time **Do Pre-Transition** is processed, **run** it for the transitioning grade (those students leaving the current school) by **selecting** the **By Grade** radio button and **selecting** the appropriate grade from the drop-down list.

3. **Set** the **Next School** default to the school where the majority of the transitioning students will attend. For example, Olive Morgan Middle School will set the Next School to Bronze Land HS as shown in the screen shot below.

4. The **Admission Date** may automatically populate based on the School Schedule for the Next School. If it does not populate, you must enter an **Admission Date** (generally, this date would correspond to the first day of school at the next school).

5. **Select** the appropriate **Admission Code**.

6. **Select** the **Over-write next grade/school** radio button so that the previous information in these fields will be updated.

7. **Select** the **Apply** button. A temporary Cross Enrollment record will be created for the students being transitioned.

**Note:** During the YET process the application looks at the Next Grade and School values for a student set during the Pre-Transition process and updates them accordingly. Students who have been pre-enrolled for the next school year will not have their grade changed as YET recognizes the future Admission Date of the pre-enrolled student.
In the example displayed above, Olive Morgan Middle School is transitioning their Grade 8 students to Bronze Land High School for the start of the next school year. Once applied, Olive Morgan Middle School may access the Pre-transition List screen and alter the Next School set for students transitioning to schools different from the one set as the default.

There is no need for Olive Morgan Middle School to run this process again. All changes to 'Next School' should be made on the Pre-transition List screen.

The Print icon allows the school to process listings of ‘Students Remaining’, ‘Students Leaving’, ‘Students Coming’ and ‘Students Active’.

High Schools

Run Do Pre-Transition multiple times for each of your Grade levels.

1. Select the By Grade radio button and select the appropriate grade from the drop-down list.

   Note: When running Do Pre-Transition for the last grade in the school, please follow the steps outlined in Step 7.

2. Set the Next School default to your school. For example, Bronze Land High School will set the Next School as shown in the screen shot below.

3. The Admission Date may automatically populate based on the School Schedule for next year. If it does not populate, you must enter an Admission Date (generally, this date would correspond to the first day of school).

4. Select the appropriate Admission Code. In this case, where students are remaining at the same school, the Admission code will not affect enrolment records but is a required entry for this process.
5. Select the Apply button.

6. Repeat the above steps for each grade level of students, except for the last grade in the school. See Step 7 for running for the Last Grade at School.

7. When running for the last grade in the school (as set in School > School Information > School Details > More Info > Grades and Catchments – SYS041) you will receive the following message window. Select OK

---

**Note to District/Enterprise Staff:** The Next Grade for the last grade at your high schools must be set in System Codes > Registration > Grades. For example, a district could have the Next Grade for Grade 12 = 12 or have the Next Grade = GR, depending on how the district would like students who have graduated to appear in eSIS.

8. You must choose whether or not to Post Next School for students in the selected grade. If Yes is selected, it will be necessary to remove the Next School on the Pre-transition List screen (see below) for any students who are NOT returning to the school next year.
9. Select the Apply button.

10. If No is selected, you will receive the following message.

11. Select OK.

12. Select the Apply button on the Do Pre-Transition screen. It will be necessary to set the Next School (and Next Grade, if applicable) on the Pre-transition List screen (see below) for any students who ARE returning to the school next year.

**Note to District/Enterprise Staff:** When using the auto withdraw feature in Year End Transition, the value listed as the Next Grade for the last grade in high schools (set in System Codes > Registration > Grades) should be the value used when auto withdrawing students. For example, if the Next Grade = GR, then when running YET Auto withdraw - one grade only, you would select GR. However, if the Next Grade = 12, then, when running YET Auto withdraw - one grade only, you would select 12.
Pre-Transition List

Path: School Menu > Pre Transition > Transition List (STU591)

In this example, the Pre-Transition List displays Students Active at Olive Morgan Middle School. The Next Grade and Next School information displays as per earlier runs of Do Pre-transition.

To change the Next Grade for an individual student:

1. Select the appropriate Grade from the drop-down list.
2. Enter the Default Admission Code (bottom of screen).
3. Select the Save button.

To change the Next School for an individual student:

4. Place the cursor in the Next School field and press F9 to display a list of values from which to select the desired school.
5. Enter the Default Admission Code (bottom of screen) and Save.
**Note 1:** Only the student’s home school has the ability to change the Next School field. The cross-enrolled (receiving) school must contact the home (sending) school if a change needs to be made to the student's Next School.

**Note 2:** If changes are made to **Next School** where no course selections or program assignments have been attached to the student, the previous next school Cross Enrollment record will be removed and the new one created. If course selections or program assignments exist at the next school, a message advises you that these records exist and the current Cross Enrollment record is not removed nor is the new record created. It is necessary to contact the school to have the next year course selection records or program assignments removed before proceeding with the change.

**Important Note:** If students are admitted within the Current Year, after the Pre-transition List has been created, you must return to the Pre-transition List screen to update the Next Grade and Next School fields for the newly admitted students.
Option Sheets

The following reports may be useful when preparing to collect student course selections for next year.

**Option Sheet Course List Report (SCH590P/R)**

This report provides a cross reference between course code and option number.

<table>
<thead>
<tr>
<th>Course</th>
<th>Title</th>
<th>Option#</th>
</tr>
</thead>
<tbody>
<tr>
<td>AR5G</td>
<td>- Tennis</td>
<td>146</td>
</tr>
<tr>
<td>AR6G</td>
<td>- InstrumentalMusic</td>
<td>146</td>
</tr>
<tr>
<td>AR7G</td>
<td>- Visual Arts</td>
<td>147</td>
</tr>
<tr>
<td>BI5A1G</td>
<td>- Field Hockey</td>
<td>142</td>
</tr>
<tr>
<td>BI5A2G</td>
<td>- Field Hockey</td>
<td>143</td>
</tr>
<tr>
<td>BI5A3G</td>
<td>- Field Hockey</td>
<td>144</td>
</tr>
<tr>
<td>BI5A4G</td>
<td>- Field Hockey</td>
<td>145</td>
</tr>
<tr>
<td>BI5A5G</td>
<td>- Computer Studies Intro</td>
<td>138</td>
</tr>
<tr>
<td>BI5A6G</td>
<td>- Computer Studies 2</td>
<td>129</td>
</tr>
<tr>
<td>BI5A7A</td>
<td>- Computer Science &amp; Tech</td>
<td>140</td>
</tr>
<tr>
<td>BI5A8A</td>
<td>- Computer Science &amp; Tech</td>
<td>141</td>
</tr>
<tr>
<td>BI5A9A</td>
<td>- French I - Advanced</td>
<td>101</td>
</tr>
<tr>
<td>BR5A1A</td>
<td>- English 2 - Advanced</td>
<td>103</td>
</tr>
<tr>
<td>BR5A2A</td>
<td>- English 3 - Advanced</td>
<td>105</td>
</tr>
<tr>
<td>BR5A3A</td>
<td>- English 4 - Advanced</td>
<td>107</td>
</tr>
<tr>
<td>BI5A4G</td>
<td>- Geography North America</td>
<td>124</td>
</tr>
<tr>
<td>BI5A5G</td>
<td>- Geography Europe/Far East</td>
<td>125</td>
</tr>
<tr>
<td>BI5A6G</td>
<td>- Geography Physical</td>
<td>126</td>
</tr>
<tr>
<td>BI5A7A</td>
<td>- Geography - Historical Geography</td>
<td>137</td>
</tr>
<tr>
<td>BI5A8A</td>
<td>- History North American</td>
<td>130</td>
</tr>
<tr>
<td>BI5A9A</td>
<td>- History North American</td>
<td>131</td>
</tr>
<tr>
<td>BI5A10A</td>
<td>- History 20th Century</td>
<td>133</td>
</tr>
<tr>
<td>BI5A11A</td>
<td>- Mathematics 1 - Advanced</td>
<td>134</td>
</tr>
<tr>
<td>BI5A12A</td>
<td>- Mathematics 2 - Advanced</td>
<td>135</td>
</tr>
<tr>
<td>BI5A13A</td>
<td>- Mathematics 3 - Advanced</td>
<td>136</td>
</tr>
<tr>
<td>BI5A14A</td>
<td>- Mathematics 4 - General</td>
<td>137</td>
</tr>
<tr>
<td>BI5A15A</td>
<td>- Mathematics - Calculus</td>
<td>138</td>
</tr>
<tr>
<td>BI5A16A</td>
<td>- Mathematics - Engineering</td>
<td>139</td>
</tr>
<tr>
<td>BI5A17A</td>
<td>- Physical Education - Coed</td>
<td>140</td>
</tr>
<tr>
<td>BI5A18A</td>
<td>- Physical Education - Coed</td>
<td>141</td>
</tr>
<tr>
<td>BI5A19A</td>
<td>- Physical Education - Men</td>
<td>142</td>
</tr>
<tr>
<td>BI5A20A</td>
<td>- Physical Education - N/A</td>
<td>143</td>
</tr>
<tr>
<td>BI5A21A</td>
<td>- Science - Level 1</td>
<td>144</td>
</tr>
<tr>
<td>BI5A22A</td>
<td>- Science - Level 2</td>
<td>145</td>
</tr>
<tr>
<td>BI5A23A</td>
<td>- Science - Level 3</td>
<td>146</td>
</tr>
<tr>
<td>BI5A24A</td>
<td>- Science - Level 4</td>
<td>147</td>
</tr>
</tbody>
</table>
Course Descriptions Report (SCH421P/R)

This report provides course codes and course catalogue descriptions.

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BKA1G</td>
<td>Keyboarding 1</td>
<td>An opportunity for all students to become proficient in keyboarding, and to develop typing skills for letters, reports, exams, forms, and tables. Highly recommended skill for computer use today.</td>
</tr>
<tr>
<td>BKA2G</td>
<td>Keyboarding 2</td>
<td>Students will develop keyboarding skills towards the level accepted by business, become aware of current business communications, develop computer word processing skills required in the work world.</td>
</tr>
<tr>
<td>BKA3G</td>
<td>Keyboarding 3</td>
<td>Students will acquire competence in the touch system on the alphabetic keyboard using all keys. They will develop skills in typing, proofreading, and format skills.</td>
</tr>
<tr>
<td>BKA4G</td>
<td>Keyboarding 4</td>
<td>Students will develop communication skills to a job-related level. Using computers, electronic typewriters, word processing equipment, and other electronic equipment, students will develop skills in word processing, data entry, and transcription.</td>
</tr>
<tr>
<td>DCT1G</td>
<td>Computer Science</td>
<td>An introduction to computers including hands-on operation of computer hardware, simple programming skills, use of software applications, an introduction to computer electronics, and the computer's impact on society.</td>
</tr>
<tr>
<td>DCT2G</td>
<td>Computer Science</td>
<td>A continuation of the introduction to computers including hands-on operation of computer hardware, simple programming skills, the use of software applications, an introduction to computer electronics, and the computer's impact on society.</td>
</tr>
</tbody>
</table>
Option Sheets for Current Students and Feeder School Students

Individual Option Sheets may be printed for each student in your school as well as for students from the feeder schools.

1. Select the appropriate Homeroom Semester that is to display on the Option Sheet.

2. Select - Print: Course Codes (e.g. MAT123) or the Short Title (Algebra 1) of the course.

3. Select the Option Range of courses within the specified Grade Levels as well as Current Grade Level (not the grade they will be in next year) of the students to be processed. Note: Enter a record for each grade to be run.

4. To process Option Sheets for students from the various Feeder schools, select the Feeder School, the Option Range (Grades) and the Current Grade from the Feeder school selected.

5. Select a Dept. to Exclude if you wish to exclude courses from a particular Department from displaying on the Option Sheet.

6. Select a Coop Dept. if appropriate.

7. Select - Print Courses Across or Down the page.

8. Enter the Number of Option Sheet Boxes to Display (defaults to 16 if left null).

9. Select the desired Sort sequence.

10. Indicate whether students without a next school specified are to receive an Option Sheet.
11. **Select - Print School Instructions** if appropriate, and **enter** the appropriate instruction.

![Print School Instructions](image)

Please enter the school instructions here. This will appear at the bottom of the option sheet entry.

12. **Select - Print Individual Course Plan** to have a student’s 4 Year Course Plan display at the top of the Option Sheet. This option is for use by Districts using **STU574 – Student 4 Year Course Plan**, discussed in greater detail in the Option Entry Methods section of this document.

13. **Select - Preprint Students Course Selections** to have courses previously entered for a student for Next Year (via Student Course Selections screen, Individual Course Plan, Mass Entry of Courses, etc) display on the Option Sheet.

**Note:** Only those Courses with the **Option Sheet?** checkbox enabled in Course Maintenance – SCH050 will display on the Option Sheet.
This is an example of how the Option Sheet could appear, based on selections made on the parameter form.
Option Entry Methods

Various methods can be used to enter options or course selections for Next Year.

Mass Entry of Courses

Path: School Menu > Option Sheet > Mass Entry of Courses (STU623)

1. In the Student Search Criteria block, select criteria such as Current or Next Year Grade, Home Room, Program Type, Team and/or SPED Criteria.

2. Once specified, the Search button populates a list of all students matching the criteria, as displayed in the screen shot above.

3. Select the Add Courses button to display the following window. Use a ✓ to indicate Courses to be Applied. Select OK when finished selecting courses to return to the previous screen.
4. **Select** the All radio button and deselect students of exception or individually select students to be assigned the courses.

5. **Click** the Apply button to place the selected courses on the indicated students’ Course Selections screen.

6. **Remove All Applied** will remove the listed courses, while the screen is still active. To use this screen to remove course after leaving the screen, **load** the students using the previous criteria, **select** the course(s) to be removed, and **click** the Remove All Applied button.

**Important Notes:**

- When selection is from Next Grade, pre-enrolled students to that grade for next year, with an admission date greater than or equal to next year’s start date, will be included, as well as students who have been cross-enrolled through the Pre-transition process.

- The column entitled ‘PE’ (Pre-Enrolled) will display a ‘Y’ if the student is pre-enrolled. You are able to sort on this column.

- Students who have NOT been processed by Pre-Transition will not appear on the list of students for whom the Mass Entry of Courses may take place for Next Year. Please note, even if students have had options entered for Next Year and the Cross Enrollment record was created, if they have not been Pre-Transitioned, they will not show up in STU623. This occurs because the Next Grade / Next School fields are not populated until Pre-Transition takes place or these fields are manually updated on STU591 – Pre-Transition List screen.

- The existing Company File option of ‘Show Special Ed on STU111’ will also activate functionality on Mass Entry of Courses. If enabled, the ‘SPED Criteria’ button and the ‘SPED’ column in the students’ block will display. You are able to sort on this column. If the Company File option is not enabled, the button and column will not appear.

- The SPED Criteria button will call a pop-up window displaying Eligibilities that may be included in the search criteria. Using the ‘Include’ and ‘Exclude’ radio buttons, you may determine the eligibilities to be included in the search. To search for students with SPED Eligibilities for next year, select the Next Year checkbox on the pop-up window.

- Searching in the Current Year will include students with a SPED Eligibility as of the current date and students who will start the program before the current year ends who do not have an End date within the current school year.

- Searching in the Next Year will include students who are pre-enrolled to a SPED Eligibility for next year.
Option Sheet Entry

Path: School Menu > Option Sheet > Option Sheet Entry (SCH055)

To enter options for students

1. Upon entry you are prompted to specify whether the options being entered are for students at the Current School or for students at Other Schools. If Other Schools is selected, you are prompted to select the Other School from a list of values and a Cross Enrollment reason.

2. Enter a Pupil No. and tab once. The student data fields will automatically populate. The Total Credit field could display information if courses were previously assigned to this student (e.g. Mass Entry of Courses, Student Course Selections, etc.). The total will not include the credit value of any alternates that exist on the student’s Next Year Course Selections screen.

3. Tab again to position the cursor in the first Option Entry field. The cursor automatically moves to the next successive option entry field once the option number is entered.

4. To enter Alternates you must click in the appropriate alternate field using the mouse. Matched Alternates are specified below the desired primary option selection. To enter Global Alternates, tab to, or click in, the fields specified at the end of each row.

5. Once all options for a given student have been entered, you may press the down arrow and begin entering options for the next student. At any time you may select the Student List, or Course List buttons to confirm a student number or a course selection’s option number.

6. Once a desired number of students have been entered select the button to commit the data entered to Student Course Selections > Next Year – STU541.

7. Select the Clear Screen button to remove data entered, but not yet saved.

8. The Summary button provides you with a running tally by grade of students with options entered.
9. Select the View Student Course Selections button to see a list of the course selections entered for students to date. Also, a √ will display in the Alt column if the course is an Alternate.

10. To add a course to student’s record on this screen select the ADD button. The Course Code, not the Option Number, must be used when adding courses.

11. To delete a specific course, highlight the course and select the DEL button.

   Note: While possible to do so on this screen, it is recommended that Courses be added or deleted using the Student Course Selections screen, where more functionality and flexibility exist.

12. Select the button to return to the previous screen.
Import Option Sheet Entry - SCH046

Menu Path: Navigate To

This form reads in a flat file and creates option sheet entry records for students (used by SCH055).

Upon completion of the file import, the user is given the message:

“The Option Sheet Entry Records for next year have been imported. No errors were encountered during this process.”

This indicates that there were no errors during the import, so there would be no reason to look at the error report. Error log displays the errors produced by the user’s most recent import.
Matched Alternates/Global Alternates

The above sample displays a Matched Alternate entry in the second field and a Global Alternate in the ALT1 field.

To add Alternates on this screen:

1. **Enter** the Matched Alternate option number in the field below the primary course selection.

2. **Enter** from one to four Global Alternates in the ALT fields at the end of the row.

**Note 1**: Double clicking an option indicates that the selection is **not** to be replaced by a global alternate during simulation. The option number will display in red.

**Note 2**: Courses set as Do Not Replace by Global Alternate in Course Maintenance will automatically display in red upon entry of the option number.

**Important**: If you use SCH046.FMX Import Option Sheet Entry, please refer to the separate text file called: SCH046_import_student_options_file_layout.txt. This text file lists the layout for importing student options.
Student Course Selections

Path: Common View Menu > Courses (STU541) OR select the Courses button on the START screen.

During Pre-Scheduling, Student Course Selections is typically used as a verification tool. Options entered through other methods may be updated here. You may elect to enter course requests on the Next year canvas in the same fashion that current year courses are entered. Since a next year Master Timetable has not yet been created, it is not necessary to Simulate prior to saving changes.

➢ The Legend button displays a window describing the various font and color attributes used in Student Course Selections; e.g. a course displayed in red italics is an Alternate course selection.

➢ The Navigate button is used to navigate to other associated windows; e.g. All Marks, Activity, Detail, etc.

➢ You are able to indicate that a student is unavailable in specific periods. From the Navigate window, select View Unavailable Periods. Select the Next Yr radio button and enter the specific timeframe(s) where the student is unavailable.

➢ Next year courses with manually assigned sections (blocked) remain unaltered when a simulation occurs.
To add a course:

1. **Select** the **Course** button. The following window displays.

2. **Highlight** the required course and click the **Select Current** button OR **select** multiple courses by placing a √ in the box on the right-hand side of the screen and click the **Select Checked** button.

3. The selected courses now appear on the Student Course Selections screen.

4. **Select** the **button to save the course selections.

**Note:** It is not necessary to Simulate when adding only courses requests in the Next year view.
**Matched and Global Alternates**

To add a Matched Alternate on the Student Course Selection screen:

1. In the course block, **scroll** to the far-right **Alternate** column of the primary course and **enter** the Matched Alternate course code.

2. When a matched alternate is added, a second course record is created, automatically displaying the alternate (in red) in the course field with the attachment to the primary course displaying in the Alternate field.

**Note:** Matched Alternates may also be populated from ‘Mass Assignments of Course Alternates’ or from ‘Option Sheet Entry’.

To add Global Alternates on the Student Course Selection screen:

1. **Enter** the course request and **click** the **Flip Alt** button to make the selection a Global Alternate.

**Note:** Global (random) alternates have no match to a primary course.
Mass Entry of Alternates

Path: School > Option Sheet > Mass Entry of Alternates (STU626)

Matched Alternates may be assigned to all students that have selected (been assigned to) a specific course for next year.

1. Select the Course from the list of values.
2. Select the Course Alternate to be applied from the corresponding list of values.
3. Select the Search button to return a list of students who are currently enrolled in the selected course for next year.
4. Select the All radio button and deselect students of exception or choose Selected option to select individual students to be assigned the alternate.
5. The following note appears on the form: “Blue records will not be applied since the selected course is an alternate. Double click to change the status of the course to primary, therefore allowing the course alternate to be applied.”
6. Select the Apply button to post the matched alternate to Student Course Selections.
Individualized Course Plan

Path: Common View > Diploma (STU552) > Ind Course Plan button

Use the Individualized Course Plan (STU570) to create a course plan that is customized to meet the needs of a specific student. This plan is usually set up by a counselor in consultation with the student and may focus on the student's diploma requirements, career objectives, personal interests or some combination of the three. From this window, a Counselor may add, view and/or modify a plan. The courses may span any number of years and grades and can be selected from the school's course catalogue, courses required for the student's diploma, courses associated with the student's career development plans or any combination of these three.

1. **Select** the **ADD** button to access the Add Course screen below.
The **Select Courses** button calls the **Select Courses for Individual Course Plan** window – STU149.

2. Using standard querying procedures, you may query for courses in any of the columns in the **Select from Query** window.

3. If only one course is required from the query, highlight the course and click the **Select Current** button to return to STU570.

4. If multiple courses are required from the query, enable the appropriate check boxes in the **Select** column. Click the **Select Checked** button to return to STU570.

**IMPORTANT NOTE:** If the District is allowing Schools to add suffixes to the Standard Course Code when creating the Course Maintenance file, the **Select from Diploma** and **Select from Career Dev. Plan** options for adding courses to the Individual Course Plan, as outlined below, are NOT available.

5. You can also select courses from the **Select from Diploma** tab as seen in the diagram below. Select the **Diploma** the student is working toward, and then select the **Diploma Category** from within this Diploma.

6. From the **Courses in Category** column, select the course to be added to the ICP (Individualized Course Plan).

7. Click the **select** button to move the course to the **Add Courses to Plan** column.
8. **Select** the **Add Courses** button to add the course to the Individualized Course Plan.

9. The final way to select a course for the Individualized Course Plan is from the **Select from Career Dev Plan** tab. **Select** the **Career Development Plan** that your student is working toward. At this point a list of courses attached to that plan will appear in the **Available Courses** section.

10. **Select** the course for the Individualized Course Plan and **click** to move that course to the **Add Courses To Plan** column.

11. **Click** on the **Add Cours...** button to return to STU570.
12. When you return to the Individualized Course Plan window - the new course has been added to the list. **Enter** the year the student will be taking the course in the **Intended Yr.** column.

![Individualized Course Plan](image)

13. **Select** the **Copy to Next Year Courses** button to populate the Next year Course Selections for the student. The following window displays.

![Copy Plan to Next Year Courses](image)

**Note:** To Create Course Selections from Individualized Course Plans for All students, see details on next page.

14. **Select** the **View Error Log** button to generate a report of any errors that occurred during the copy process.
Select the button and select the appropriate options to generate the Individualized Course Plan Progress Report.

<table>
<thead>
<tr>
<th>Course in Plan</th>
<th>Code</th>
<th>Grade</th>
<th>Credit</th>
<th>Hours</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer Science 2</td>
<td>12 C</td>
<td>1.000</td>
<td>10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>English - English 3 - Advanced</td>
<td>12 C</td>
<td>1.000</td>
<td>11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Administration 6 - Advanced</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>English - Science - Level 4</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Create Options from Individualized Course Plan (or the 4 Year Course Plan)

Path: School Menu > Option Sheet > Create Options from Individual Course Plans (STU571)

Courses may be copied for all students from the Individualized Course Plan (or the Student 4 Year Course Plan – see details on next page) to Student Course Selections – Next Year.

1. Select Create Options from Individual Course Plans from the School > Option Sheet menu.

2. The School Year will populate from School Details – Next Year.

3. Select the Copy to Next Year Courses button.

4. When the process is complete, click the View Error Log to see courses that were not copied.
4 Year Student Course Plan

Path: Common View > Diploma (STU552) > Ind Course Plan button

The 4 Year Student Course Plan (STU574) has been created to aid counselors in planning a student’s high school career. The appropriate program name (STU574) must be entered in the Individual Course Plan field of the Company Update > Reporting Tab by the District if schools wish to use this feature.

The plan is accessed via the Individual Course Plan Button on the student’s Diploma Screen. You can view the following (depending on the grade of the student): historical data from Credit Details, Current Year Course information, Next Year Course information and Future Course information. The screen will also display credits earned and potential / forecasted credits. Courses can be added or deleted from Future years and can be deleted from Next Year if the courses are not yet scheduled. You must delete courses for Next Year from STU541 – Student Course Selections.

To add or delete courses, you must first activate the desired year by clicking in the appropriate column. If adding courses to a future year, the user must follow the steps described above in the Individualized Course Plan section.

Important Note: If the District is allowing Schools to add suffixes to the Standard Course Code when creating the Course Maintenance file the Select from Diploma and Select from Career Dev. Plan options for adding courses to the 4 Year Student Course Plan are NOT available.

Note: If a student with a 4 Year Student Course Plan changes schools, the new school would need to delete the courses that remain on the Plan for future years from the previous school and enter courses that the new school is offering.
### 4 Year Student Course Plan Report (STU574R)

Select the button to generate the 4 Year Student Course Plan Report. The report displays the information shown on STU574.

![Course Plan Report](image)

<table>
<thead>
<tr>
<th>Semester</th>
<th>Course Code</th>
<th>Course Title</th>
<th>Credit</th>
<th>Grid</th>
<th>SFT</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>CORE210</td>
<td>Core Course</td>
<td>1.00</td>
<td>A</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>CPED230</td>
<td>Core Elective</td>
<td>0.00</td>
<td>B</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td>CSCI230</td>
<td>Core Course</td>
<td>1.00</td>
<td>A</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td>CSCI220</td>
<td>Core Course</td>
<td>1.00</td>
<td>A</td>
<td>0</td>
</tr>
<tr>
<td>6</td>
<td>MATH100</td>
<td>Core Course</td>
<td>1.00</td>
<td>A</td>
<td>0</td>
</tr>
<tr>
<td>6</td>
<td>MATH125</td>
<td>Core Course</td>
<td>1.00</td>
<td>A</td>
<td>0</td>
</tr>
</tbody>
</table>

Total Credits: 30
Scheduling Utilities

Evaluate Course Requests

Path: School Menu > Scheduling Utilities > Evaluate Course Requests (SCH009)

Evaluate Course Requests is a Scheduling Utility that can be used in either the current or next year to analyze student course requests. Students will appear on the list if they have too few course selections, too many course selections or not enough alternate course selections. The program automatically calculates the number of possible timetabling ‘slots’ available by multiplying the number of Semesters x Terms x Days x Periods. A student will appear on the list if the number of course requests for the specified year exceeds this number. The ‘Reason’ column will display ‘Too many courses’. The function uses the manually entered ‘Minimum Scheduling Slots’ to determine ‘Too few courses’ and the manually entered ‘Minimum Number of Alts’ to determine ‘Not enough alternates’.

Direct access to STU541 Student Course Selections is available from the Courses button at the far right of the selected row. Users may access this screen to make modifications to the student’s course selections.

The Refresh button may be used to requery student records if changes were made to the ‘Minimum Scheduling Slots’ or ‘Minimum Number of Alts’ or if changes were made on Student Course Selections.

A new query occurs each time the form is accessed based on the previous selections on this form.
Students Missing Pre-requisites/Co-requisites

Path: School Menu > Scheduling Utilities > Students Missing Pre-requisites (SCH007)

During the Pre-Scheduling process, this utility can be helpful in determining which students are missing one or more Pre-requisites or Co-requisites for Next year. This screen may take some time to load as eSIS does its background investigations to determine if students are missing Pre or Co-requisites before populating the form.

How eSIS Determines a Missing Pre-requisite

- Looks in Credit Details – STU160 for the Pre-requisite course and checks the student’s final grade.
- If the course cannot be found, or if a failing grade is found, eSIS then checks Current Year Course Selection for the course. If the course is found there, eSIS assumes a passing grade and the Pre-requisite fulfilled.
- If the course is not found in Current Year, eSIS looks at Course Selections for Next Year and if the course is found, the Pre-requisite is fulfilled.
- If eSIS cannot find the Pre-requisite in any of these conditions, the student will display on the screen.

How eSIS Determines a Missing Co-requisites

- Looks to the student’s Course Selections for Next Year. If the Co-requisite is not found, the student will display on the screen when the Co-requisites radio button is selected.
To Use This Screen

1. Select the Next School Year.

2. Users may toggle between students missing Pre-requisites and missing Co-requisites by selecting the appropriate radio button in the top left-hand area of the screen. Each time a user enters the screen or changes views, a refresh occurs, providing real time information.

3. To view the Pre-requisite/Co-requisite that a student is missing, select the See Missing button for the highlighted student. The following window displays.

4. Use the Course Code pull down menu to select the course for which a Pre-requisite or Co-requisite is missing. The missing course displays in the Required Courses block.

5. Select the Enrol Student In Course button to add the missing course to the student’s record. You will be prompted to confirm your decision. Select Yes to proceed or close the window using the X in the upper right-hand corner.
6. **Select** the button to save the course to the student’s Course Selections screen for **Next** year.

7. **Select** the button to return to the Students Missing Pre-requisites screen.

8. **Select** the **Refresh** button to get an updated view of Students Missing Pre-requisites.

**Note:** The Students Missing Pre-requisites screen also allows users to simulate students into sections. During the Pre-Scheduling phase of the training, course sections have not yet been created, therefore, Simulation is not required. For this reason, we will revisit this functionality at the end of Scheduling training and we have sections in place.

**FYI...**

![Simulation Status](image)

- N = Not Simulated;
- S = Successfully Simulated;
- W = Successfully Simulated with a Warning (e.g. Student scheduled into all courses but did not receive a lunch);
- F = Failure to Simulate.
Mass Entry of Blocked Periods

**Path:** School Menu > Scheduling Utilities > Mass Entry of Blocked Periods (SCH016)

This utility may be used to mass assign an unavailable period to a group of students from a specific Course, Grade, or Team (students who fall outside of those criteria may also be included on an individual basis – see Step 4 below). For example, if you are not using the eSIS Lunch function, this utility could be used to set all grade 9 students as unavailable for period 4 – their lunch period.

To make a group of students unavailable for a specific period:

1. **Select** the appropriate **Load Type** and the appropriate **Load Value** from the drop-down lists.

2. **Select** the **Load Students** button. A list of students that meet the search criteria will appear.

3. A √ is enabled for all students. **Uncheck** students not to be included in this procedure or use the **Toggle** button to uncheck all students and √ the appropriate students.

4. If a student needs to be included in the group but is not contained within the Load Type or Value, **select** the **ADD** button to call the **Select Pupil** screen. Query for the specific student and **click Select**. The selected student will be added to the previously created list of students.

5. **Select** the **DEL** button to remove a highlighted student from the list.

6. **Enter** the unavailable timeslot for the selected students in the **Semester**, **Term**, **Day**, and **Period** fields.
7. **Select** the **Make Unavailable** button to make all selected students unavailable for the indicated Semester, Term, Day, and Period. The following window appears:

![Image of Make Unavailable window]

8. **Click OK.** A Yes will display in the Conflict column if a student has a class in the period being made unavailable. A No will display in the column if the student is not currently scheduled into a class for the period being made unavailable. The simulator will not schedule a student into a timeslot for which they are unavailable.

To make a group of students **available** for a timeslot in which they are currently unavailable:

1. If there is a group of students that currently have a period set as unavailable and you wish to make them available, **load** the students as per the instructions outlined in steps 1 through 5 above.

2. **Enter** the **Semester, Term, Day, and Period** information for which the group is currently unavailable.

3. **Select** the **Make Available** button. The following window appears.

![Image of Make Available window]

4. **Click OK.** The selected students are now available for the designated Semester, Term, Day, and Period.
Class Transfer

Path: School Menu > Scheduling Utilities > Class Transfer (SCH015)

The Class Transfer utility gives you the ability to remove a course or class from a selected group of students, add a new course or class to the same students and to simulate the new course or class into each of the student’s schedules in either the current or next school year.

There are two Screen Layouts of the Class Transfer Screen. The Advanced screen layout gives you greater flexibility in altering course requests or class placements for the selected group of students. The Basic screen layout is only a data entry screen, allowing you to select the students you wish to manually place into a class.

The Class Transfer screen allows you to add Next Year courses or classes to Current Year students. In the Courses/Class to Add block on the Class Transfer screen, School Year: Current and Next radio buttons were added so you can query students based on Current year or Next year information.

When you access the Class Transfer screen, a pop-up window displays asking you to select the school year in which you would like to work. Your choice will determine which radio button (Current or Next) is active in the Student Query and the Courses/Classes to Add blocks.

If you select Next, the School Year: Current and Next radio button will be set to Next in both blocks and the radio button will be disabled in the Courses/Classes to Add block.

If you select Current, the School Year radio buttons in both blocks are set to Current. In the Student Query block, you can search for students based on a Current Year Course, Class, Homeroom, and/or Team. You must then select Next radio button in the Courses/Classes to Add block to add a Next Year course to the selected students.

Note: The YOU ARE IN NEXT YEAR!!! red banner has been removed from this screen so it is very important to remain aware of the year in which you are working.
Student Query

1. After determining the School Year, Select a Load Type from the dropdown list in the Student Query block:
   - Class – to select all students in a specific class (course and section number)
   - Course – to select all students with a specific course code
   - Grade – to select all students in a specific current year grade (regardless of School Year selected)
   - Team – to select all students on a specific team
   - Homeroom – to select students from a specific Homeroom

2. Select the specific Load Value from the dropdown list. The Load Values displayed will vary based on the Load Type selected. Select the required Class (course and section), Course, Grade, Homeroom, or Team.

3. Click the Load Students button. Based on the Load Type and Value selected above, the students will appear sorted by Name. If the Load Type selected was Course, and the School Year selected is Next, the pop-up window, seen below, will display. Selecting Yes will include those students who have the designated course as an Alternate Course Selection. Selecting No will return only those students who have the designated course as a Primary Course Selection.
4. All students in the list will have a checkmark (✓) displayed in the **Checked** column. All students selected will be involved in the changes that are to occur.

- To de-select individual students, **click** the checkmark to disable, OR
- **Click** the **Toggle** button at the bottom of the 'Checked' column to disable ALL checkmarks and then **select** only the students to be processed. (Remember to scroll down the list at the far right if the scroll bar is active.)
- The **Add Student** button located below the student column will call the Select Pupil screen where you may query for additional students to add to the list of students.
- To delete a student from the listing, **select** the student and **click** the **Del Student** button to remove the student from the listing prior to processing changes. **Note:** This does not remove students from the Class, Course, Grade, or Team of students. It simply removes them from the 'visual' listing.

**Functions that may be performed:**

When the appropriate group of students has been selected, the following functions may be performed:

1. **To Remove Students:** If the Load Type = Class, the **Remove Class** button will display below the Load Value. If the Load Type = Course, the **Remove Course** button will display below the Load Value. Selecting Remove Class or Remove Course will drop the course or class displayed in the Load Value field from each of the selected students. **Note:** When the process is complete, the same list of students' remains displayed. This affords the user the ability to add a new course or class to the same selected students.

2. **To Add a Course:** **Select** the course code from the Course dropdown list in the 'Courses/Classes to Add' block. **Select** the **Add Course** button. **Note:** In the 'Courses/Classes to Add' block, if the School Year selected is Current, it is necessary to Simulate upon completion of adding the new course. (See details in #4 below.) If the School Year selected is Next, you are not required to Simulate at this time.

3. **To Add a Class:** **Select** a Course from the Course dropdown list and **select** a **Section** from the Section dropdown list. The button changes from Add Course to Add Class when a Section has been selected. **Click** the **Add Class** button. **Note:** Because a student may already have a scheduled class in same Semester, Term, Day, and Period as the selected class, it is necessary to Simulate upon completion of adding the new class. This is required when adding a class in the Current or the Next school year (if scheduled sections exist in Next Year).
4. **To Simulate (if necessary):** Select the Simulate button. Each student will be simulated in the order they appear on the screen. The student currently being simulated will be highlighted. The Simulation Status will default to N – Not Simulated. After simulation, the radio buttons will indicate the results of the Simulation: S – Successful, W – Warning, F – Failure. Select the Sim Message button to view the results when a Warning or Failure occurs.

   **Note:** When simulating in the Next School Year, any unscheduled course that exists on Student Course Selections will also be included in the simulation for the selected group of students.

5. **To re-simulate ALL courses** for Checked students, it is necessary first to unschedule all of the selected students’ courses. Select the Unschedule All button to perform this function if required. Then select the Simulate button.

   **Note:** This is not normally done once classes have begun. See the Important note below re: Unschedule All.

6. When all functionality has been performed for the selected group of students, select the Clear Students button to prepare the screen for a new query.

7. **Important:** The Unschedule All button will unschedule ALL classes for all checked students that are contained within the Students block. If this button is selected, the following window will appear warning you of the results of using this function.

   Select **Yes** if you wish to unschedule ALL classes for the selected students. Select **No** to prevent students from having their schedules removed.

**Additional Notes**

If you wish to add one Class or Course to some of the selected students in the list and another course or class to the others, use the Toggle button to switch between the selected and unselected students. Do not Clear Students until all actions have been performed.
Class Transfer – Basic Screen Layout

The Basic screen layout is a data entry screen allowing you to select the students you wish to manually place into a class in either the current or next school year, based on the year selected on the Advanced view. Remember that this screen is used to place students into a specific section or class and can only be used when the school’s master schedule resides in Course Section Maintenance.

1. Select the appropriate School Year from the radio buttons at the top right-hand corner of the screen – Current or Next.

2. From the Courses/Classes To Add block, select the Course and Section from the appropriate dropdown lists. The relevant Class Detail information will display in the Teacher, Course Short Name and STDP fields.

Adding the Students

1. If known, enter the Pupil Number. If not known, click the Add Students button to access the Select Student screen. Query and select the student required. Continue until all students have been selected. Click the Add Class button.

   Note: It is necessary to Simulate upon completion of adding the new class. This is required when adding a class in the Current or the Next school year.

2. To Simulate the new Class (in Current or Next Year), click the Simulate button. Each student will be processed in the order they appear on the screen. The student currently being processed will be highlighted. The Simulation Status will default to N – Not Simulated. As the simulation occurs, the radio buttons will indicate the results of the Simulation: S – Successful, W – Warning, F – Failure. Click the Sim Message button to view the results when a Warning or Failure occurs. Note: When simulating in the Next School Year, any unscheduled course in Student Course Selections is also included in the simulation for the selected group of students.

3. When complete, click the Clear Students button to prepare the screen for a new query.
Reports

The following are some of the reports that may be useful for verifying data following the entry of student course selections.

Note: If using STU475R.REP Student Timetables, it is designed to run only for the Current year.

Options Verify Letter (SCH625P/R)

The following report displays, in letter format, course selections entered for a student. Choices on the parameter form include displaying Course Type, Fees and/or Alternate Indicator.

Student No: 9905333
Name: Abaco, Giza
Address: 10151 Midway Ave
Rockville, OH 20031

The courses listed below have been recorded from the program selected by you and your son or daughter. If you think an error has been made in the transcription of this information, please indicate the changes below and return the form to the school office immediately.

Thank you for your prompt attention.

<table>
<thead>
<tr>
<th>Course</th>
<th>Course Type</th>
<th>Alternate?</th>
</tr>
</thead>
<tbody>
<tr>
<td>BKA2O</td>
<td>General</td>
<td>N</td>
</tr>
<tr>
<td>C5A4X</td>
<td>Advanced</td>
<td>N</td>
</tr>
<tr>
<td>ENIHA</td>
<td>Advanced</td>
<td>N</td>
</tr>
<tr>
<td>GREKG</td>
<td>General</td>
<td>N</td>
</tr>
<tr>
<td>HNC2O</td>
<td>General</td>
<td>N</td>
</tr>
<tr>
<td>MGA3A</td>
<td>Advanced</td>
<td>N</td>
</tr>
<tr>
<td>MFHIA</td>
<td>Advanced</td>
<td>Y</td>
</tr>
<tr>
<td>SIE2G</td>
<td>General</td>
<td>N</td>
</tr>
<tr>
<td>P6DHO</td>
<td>General</td>
<td>N</td>
</tr>
</tbody>
</table>

Date: ____________________________  Signature of Parent/Guardian: ____________________________
**Student Course Selections (STU495P/R)**

This report lists all students in a school and the course requests that have been entered for them. The report includes some basic demographic information such as the Phone number, Grade, Ethnicity and Gender. Alternate course selections are underlined.

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
<th>Grade</th>
<th>Gender</th>
<th>Ethnicity</th>
<th>Courses Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miles, Ashley</td>
<td>(704) 930-1400</td>
<td>10</td>
<td>F</td>
<td>White</td>
<td>Math, Science, English</td>
</tr>
<tr>
<td>Ferguson, Billy</td>
<td>(704) 655-8767</td>
<td>10</td>
<td>F</td>
<td>White</td>
<td>Math, Science, English</td>
</tr>
<tr>
<td>Gironbo, Aliona</td>
<td>(704) 655-9272</td>
<td>10</td>
<td>F</td>
<td>White</td>
<td>Math, Science, English</td>
</tr>
</tbody>
</table>

**Condensed Course Selection List (STU513P/R)**

This report can list all students in a school and the course selections that have been entered for them. Alternate course selections are underlined.

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
<th>Grade</th>
<th>Gender</th>
<th>Ethnicity</th>
<th>Courses Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avanza, Antonio</td>
<td>(704) 930-1400</td>
<td>9</td>
<td>M</td>
<td>White</td>
<td>Math, Science, English</td>
</tr>
<tr>
<td>Agosilo, Paul</td>
<td>(704) 655-8767</td>
<td>9</td>
<td>M</td>
<td>White</td>
<td>Math, Science, English</td>
</tr>
<tr>
<td>Avinap, Frederick</td>
<td>(704) 655-9272</td>
<td>9</td>
<td>M</td>
<td>White</td>
<td>Math, Science, English</td>
</tr>
<tr>
<td>Aliberti, Gisella</td>
<td>(704) 930-1400</td>
<td>11</td>
<td>F</td>
<td>White</td>
<td>Math, Science, English</td>
</tr>
</tbody>
</table>
Course Request Tally (STU610P/R)

This report lists the number of course requests for next year. An option to display the Current year requests is available. The report may be sorted by Department, Grade Level or Course Code.

<table>
<thead>
<tr>
<th>Mathematics</th>
<th>School Year: 2000</th>
<th>School Year: 2001</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Actual</td>
<td>Reg</td>
</tr>
<tr>
<td>MATH: Mathematics I - Advanced</td>
<td>153</td>
<td>150</td>
</tr>
<tr>
<td>MATH: Mathematics II - Advanced</td>
<td>98</td>
<td>94</td>
</tr>
<tr>
<td>MATH: Mathematics III - Advanced</td>
<td>90</td>
<td>55</td>
</tr>
<tr>
<td>MATH: Mathematics IV - General</td>
<td>95</td>
<td>95</td>
</tr>
<tr>
<td>MATH: Mathematics - Calculus</td>
<td>63</td>
<td>63</td>
</tr>
<tr>
<td>MATH: Mathematics - Finite</td>
<td>83</td>
<td>63</td>
</tr>
<tr>
<td>Totals</td>
<td>567</td>
<td>560</td>
</tr>
</tbody>
</table>

Department Summary

<table>
<thead>
<tr>
<th>Department</th>
<th>School Year: 2000</th>
<th>School Year: 2001</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Actual</td>
<td>Regular</td>
</tr>
<tr>
<td>All</td>
<td>103</td>
<td>100</td>
</tr>
<tr>
<td>Computer Science</td>
<td>687</td>
<td>846</td>
</tr>
<tr>
<td>English</td>
<td>408</td>
<td>402</td>
</tr>
<tr>
<td>Geography</td>
<td>408</td>
<td>402</td>
</tr>
<tr>
<td>History</td>
<td>312</td>
<td>307</td>
</tr>
<tr>
<td>Mathematics</td>
<td>367</td>
<td>390</td>
</tr>
<tr>
<td>Music</td>
<td>246</td>
<td>244</td>
</tr>
<tr>
<td>Physical Education</td>
<td>265</td>
<td>252</td>
</tr>
<tr>
<td>Science</td>
<td>408</td>
<td>402</td>
</tr>
<tr>
<td>Technology</td>
<td>312</td>
<td>308</td>
</tr>
<tr>
<td>Totals</td>
<td>3730</td>
<td>3672</td>
</tr>
</tbody>
</table>
Course Request Tally by Grade (STU611P/R)

The Course Request Tally by Grade displays total course requests and a breakdown by current year grade level.

<table>
<thead>
<tr>
<th>Computer Science</th>
<th>Actual</th>
<th>Regular</th>
<th>SPED</th>
<th>Min</th>
<th>Nov</th>
<th>Sections</th>
<th>Required</th>
<th>Extra Seats</th>
<th>Cancel or Combine With</th>
<th>Age</th>
<th>Gr. 10</th>
<th>Gr. 11</th>
<th>Gr. 12</th>
<th>Gr. 13</th>
</tr>
</thead>
<tbody>
<tr>
<td>BHA/G: Keyboard 1</td>
<td>185</td>
<td>185</td>
<td>0</td>
<td>15</td>
<td>30</td>
<td>7</td>
<td>24</td>
<td>0</td>
<td>0 0 0 0 0 0 0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BHA/G: Keyboard 2</td>
<td>184</td>
<td>184</td>
<td>0</td>
<td>15</td>
<td>25</td>
<td>7</td>
<td>21</td>
<td>0</td>
<td>0 0 0 0 154</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BHA/G: Keyboard 3</td>
<td>96</td>
<td>96</td>
<td>0</td>
<td>15</td>
<td>23</td>
<td>4</td>
<td>4</td>
<td>0</td>
<td>0 0 0 0 0 0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BHA/G: Keyboard 4</td>
<td>96</td>
<td>96</td>
<td>0</td>
<td>15</td>
<td>24</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0 0 0 0 0 0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CCGG: Computer Studies 1</td>
<td>183</td>
<td>183</td>
<td>0</td>
<td>15</td>
<td>30</td>
<td>7</td>
<td>23</td>
<td>0</td>
<td>0 0 0 0 0 0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CCGG: Computer Studies 2</td>
<td>184</td>
<td>184</td>
<td>0</td>
<td>15</td>
<td>23</td>
<td>7</td>
<td>21</td>
<td>0</td>
<td>0 0 0 0 154</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>871</strong></td>
<td><strong>871</strong></td>
<td><strong>11</strong></td>
<td><strong>35</strong></td>
<td><strong>2</strong></td>
<td><strong>11</strong></td>
<td><strong>35</strong></td>
<td><strong>0</strong></td>
<td><strong>0 0 0 0 0 0 0</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Student Course Requests (SCH305P/R)

This report displays a complete list of the students requesting specific courses. Underlined students have selected the specified course as an Alternate course selection.
# Four or Less Course Selections (STU512P/R)

This report lists students with less than, greater than, or equal to, a specified number of courses or credits.

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Pupil No.</th>
<th>Grade</th>
<th>Him</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams, Ryan</td>
<td>9065058</td>
<td>12****</td>
<td>Not As</td>
</tr>
<tr>
<td></td>
<td>Courses Selected: 0</td>
<td>Add Courses:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total Courses: 0</td>
<td>Total Credit Value: 0.000</td>
<td></td>
</tr>
<tr>
<td>Atkinson, Lew</td>
<td>9065970</td>
<td>12****</td>
<td>Not As</td>
</tr>
<tr>
<td></td>
<td>Courses Selected: 0</td>
<td>Add Courses:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total Courses: 0</td>
<td>Total Credit Value: 0.000</td>
<td></td>
</tr>
<tr>
<td>Alto, Paula</td>
<td>9065877</td>
<td>12****</td>
<td>Not As</td>
</tr>
<tr>
<td></td>
<td>Courses Selected: 0</td>
<td>Add Courses:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Total Courses: 0</td>
<td>Total Credit Value: 0.000</td>
<td></td>
</tr>
<tr>
<td>Alto, Paulo</td>
<td>9065000</td>
<td>12****</td>
<td>Not As</td>
</tr>
<tr>
<td></td>
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Pre-Scheduling Checklist

- Check School Details
- Create Next Year School Schedule
- Create Course Lengths and Formats
- Create Course Start Dates
- Copy and update Grades/Catchments
- Create and/or check Period Start and End Times
- Create Non School Days
- Create Reporting Periods
- Create and/or check Departments
- Create and/or check Rooms
- Create, or copy and update Staff Maintenance
- Add new staff for next year
- Update Staff Restrictions
- Create or copy Homerooms
- Create or copy Fees
- Create or copy Teams/Groups
- Create new Teams for next year
- Create or copy Courses
- Update Course Maintenance for next year
- Run Pre-transition
- Create Course Catalogue
- Create Student Option Sheets
- Distribute Option Sheets & Course Catalogue
- Collect and enter Student Course Requests
- Evaluate Course Requests & Students Missing Pre/Co-requisites
- Run reports to check accuracy of data