SIS2000+ Training Manual

Mass Scheduling

Creating and Using Career Plans

Using the Career Plan Editor

Pre-Requisites

Courses must have been defined through the District Courses Editor to set-up Career Plans. To generate course requests through a Career Plan, those courses must be selected for the 'target' track and students must be assigned to that track. To select courses for a track, refer to the Course Selection Editor. Use the Student Editor to assign students to tracks.

Purpose

The Career Plan Editor is a means to define required and suggested courses for a specific group of students sharing similar achievements or goals. A career plan is a set of courses that forms the basis of student course requests. Once the career plan has been established, it becomes a tool for counselors to use in guiding students. By defining specific courses, or groups of courses for these students to take, the scheduling system can help counselors keep their students on track by generating the appropriate courses for each grade level. Career Plan course requests can be generated from within the Career Plan Editor or from the Course Requests Editor. The generated course requests can then be used by the various other scheduling applications, such as the Course Requests Editor, the Student Loader, and the Student Schedule Editor.

Training Objectives

Develop Career Plans for students with particular goals. Generate Course Requests for those students.

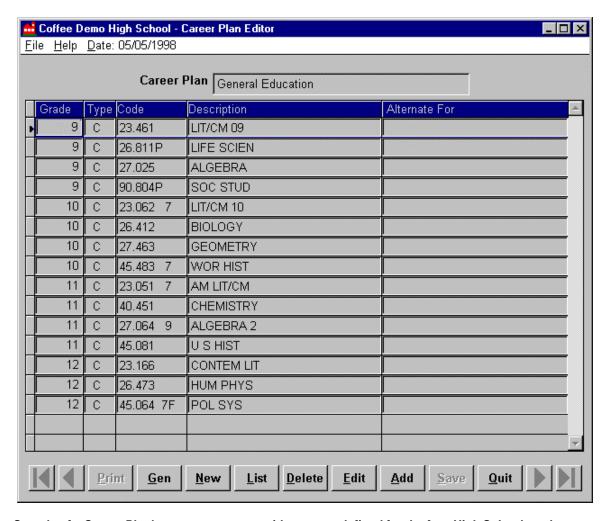
Launch the Career Plan Editor

From the Scheduling Menu, click on Career Plan.

The opening screen will default to the first Career Plan in the district database (if any have been created previously).

Select a Career Plan to view using either the List feature or the VCR buttons.

The following is a sample Career Plan with general courses selected for each of the grade levels.



Sample of a Career Plan's summary screen with courses defined for the four High School grade levels.

Screen Layout

The career plan in the example above has been sorted in ascending order by grade level. The courses required at each grade level are displayed as line entries with the following data fields:

(This is a read-only screen, editing and adding of courses in a Career Plan will be done on another screen from within this application.)

Grade - grade level for enrollment in the course. Course Requests will be generated for students based on the grade level for the track the Career Plan is generating requests for. (i.e., Ninth graders will only receive requests for those courses whose 'Grade' field is set to 'Ninth'.)

Type - displays a code for the type of course, as follows:

C (Course) - a single course (as defined in the District Courses database).

G (Group) - a group of courses (as defined in the Group Editor program)

T (Team) - the Team the Schedule Loader will attempt to schedule a student's requests into. (as defined in the Team Editor program)

Code - the course, group, or team ID number.

Description - the name of the course, group, or team.

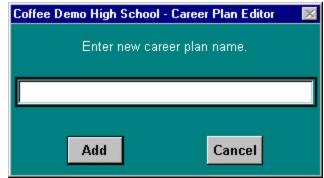
Alternate for - the name of the request that this course is an alternate for, if applicable.

Create a Career Plan

Click on **New** from the bottom of the screen.

Naming the Career Plan

A dialogue box will come up prompting you to name your new Career Plan. Type in the name and click **Add** to continue or **Cancel** to abort.



Career Plan naming dialogue box.

NOTES: When designing and naming Career Plans it is important to keep long-term goals in mind. You can make Career Plans that are for only one grade and name them accordingly, but this may not be the most efficient use of this program for your school. You may prefer to group your courses together into a more 'generic' Career Plan (as in the above example) that encompasses courses for several grade levels. When you Generate those requests, SchoolNet will look at the grade level of the student, and the grade level set in the Career Plan, and only request the appropriate courses. That way, you might only make three Career Plans, for example ('General', 'Honors', 'Remedial'), each with courses for all grade levels. For this example, if you split each plan into the 4 grade levels at a High School, you would have 12 Career Plans instead of three.

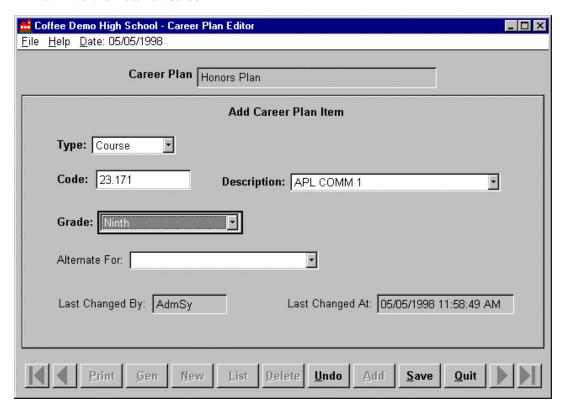
Plus, since you can define a student's 'designated' Career Plan through the Student Editor, you could set the Career Plan once (if the student stays on the same plan throughout his or her time at a school) in the Student Editor and not have to go back and change the 'designation' each year as the student is promoted to the next grade level.

If you would prefer to separate the Career Plans by grade level, and/or not set a 'designated' Career Plan for students within the Student Editor, that is completely acceptable and will not have any adverse effects on the system.

After you have clicked on **Add**, a blank Career Plan summary screen will be displayed and you can begin adding courses to it.

Adding Courses to a Career Plan

To add a course to a Career Plan, click **Add** from the bottom of the screen. The summary screen will turn into the Add/Edit screen.



Career Plan Editor Add/Edit Screen where selections/changes are made to courses in a Career Plan.

When the screen opens, the only 'active' (editable) field will be **Type**. Once a type is selected, **Code, Description**, and **Grade** will become activated.

Select the **Type**, enter the **Code** (or select to course from the **Description** drop-down box), and select the **Grade** level of the students that this course request will be generated for.

If a course request should be generated for more than one grade level it will have to be added to the Career Plan for each level it will be offered for. (i.e., if Ninth and Tenth graders will be taking the same course, you would enter that course twice, selecting 'Ninth' as the Grade for the course the first time, and 'Tenth' as the Grade the second time you add the course.)

If this is a Primary Request (not an Alternate) you may click on **Save** and continue adding courses to your Career Plan. You will not be able to save a course if the any of the selections in **Type, Code, Description, or Grade** have not yet been made.

Keep in mind that although all courses defined in the District Course database are available as selections when creating a Career Plan, only courses that have been assigned to a student's school and track via the Course Selection Editor will be available as Course Requests for that student. Requests for courses that are not assigned to the target track will not be generated.

Alternates

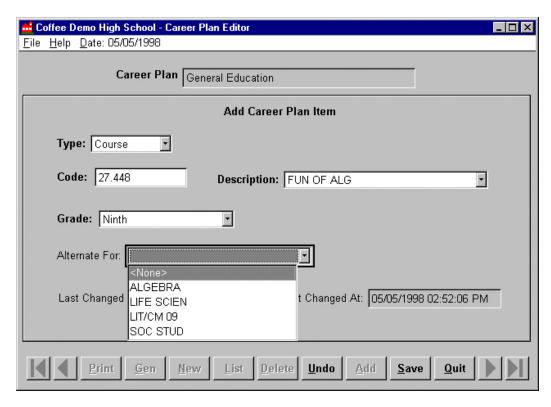
If the course you are adding is an **Alternate For** another course in the Career Plan you would enter the course information in the aforementioned fields as you normally would.

Then, after you have filled in those fields, select the course that this is an Alternate For from the 'Alternate For' drop-down box. Click **Save** when you are done or **Undo** to abort.

NOTES: The courses available in this drop-down box are dependant upon a few things. A Grade Level must be selected. The **Alternate For** selection box will not go into Edit mode until a Grade Level is selected.

The courses that show up as choices for what this course may be an **Alternate**For must have been entered before the alternate is entered. (i.e., enter Primary requests before you enter Alternate Requests.)

The courses that show as choices in the **Alternate For** box are also **grade-specific**. (i.e., if you select 'Ninth' as the Grade Level, only courses that were <u>previously</u> entered into that Career Plan, with 'Ninth' grade selected will show as choices.



Alternate course being added to the previously displayed Career Plan. Note that since 'Ninth' was selected as the Grade, only the other courses that were entered for Ninth Graders are showing as available choices for this course to be an Alternate For.

Adding Teams

If you know ahead of time that the students who will be receiving requests from a Career Plan should also be a part of a particular Team, you may add a Team Request to that Career Plan at this point as well.

NOTE: you can not simply enter a Team request with no courses. Teams are tied to particular students through a Team Request, and are linked to teachers in the Master Schedule. They are not tied to courses, however. That is why **you must add in BOTH the Course Requests and the Team Request**.

To do this, simply click Add as you normally would, after selecting the proper Career Plan.

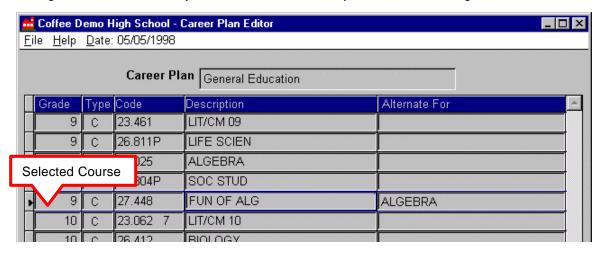
For **Type**, choose **Team** and make the appropriate choice from the **Description** box. Click **Save**.

NOTE: Team Requests will display with a 'T' in the 'Type' column of a Career Plan's summary screen.

Editing / Deleting Courses from Career Plans

Select the proper Career Plan using List or the VCR buttons.

Select the course you want to Edit or Delete. A selected course will be outlined in blue and will have a small black arrow next to the 'Grade' column on the summary screen. Click on the proper button (**Edit** or **Delete**). Make the necessary changes to a course on the selection screen if editing and click **Save** when you are done. Or, confirm your choice if deleting.



Career Plan with a course selected to be Edited or Deleted.

Using Career Plans

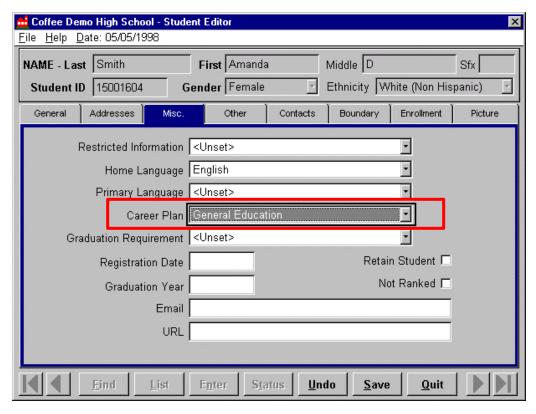
When generating Course Requests by using Career Plans, you will have to make several selections regarding what Plan to generate and for whom. You can generate requests for students with designated Career Plans, or you can generate them for students without a Plan designated. Or you can do both.

Designating Career Plans

As previously mentioned, you may designate a specific Career Plan for a student through the Student Editor. This can be done at the time a student is first enrolled, or at any other time after a student has been enrolled. The designation can be changed at any time and can be 'over-ridden' when using the Course Requests Editor to generate requests.

Setting a Career Plan designation is not required whatsoever. It is completely up to the user.

In the Student Editor go to the Miscellaneous tab and select the proper Career Plan from the 'Career Plan' drop-down box. (For more information on the Student Editor, please refer to the appropriate documentation.)



Student Editor Miscellaneous tab showing a designated Career Plan of 'General Education' for a selected student.

In the examples followed throughout this documentation, a regular student could have the 'General Education' Plan designated for all four years in a High School, and each year the appropriate requests would be generated based on the student's Grade Level.

If you designated Career Plans that include requests for only one Grade Level, you would have to change the Career Plan designations for each student every school year.

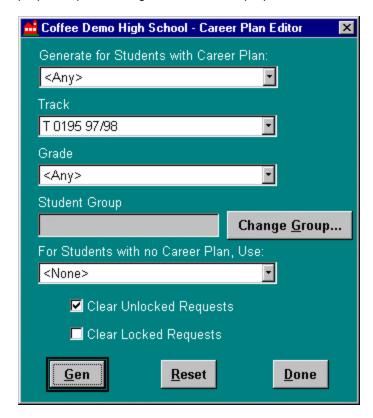
Generating Course Requests

According to the parameters selected, Course Requests will be automatically generated and placed in the Course Request Editor program and the Student Schedule Editor where they can be used in the scheduling process. However, only those courses which have been assigned to a student's school and track via the Course Selection Editor can appear as Course Requests for that student.

Remember that some individual students who require a specific Career Plan may have had that Plan selected in the Career Plan field in their Student Editor record.

When you are finally ready to Generate your students' Course Request using Career Plans, click on the **Gen** button from the bottom of the summary screen.

The Generation screen will come up with several selections that must be made to ensure that the proper requests are generated for the proper students.



Career Plan Generation selection screen.

The selections made for Generating Course Requests are as follows:

- Generate for Students with Career Plan this field is used to select what Requests you want to generate based on what has been selected in the Student Editor as a student's designated Career Plan.
 - <annual color of this is selected, the Generation Procedure will generate the appropriate Course Requests for students with ANY Career Plan designated in the Student Editor. It will not generate for students with no Career Plan designated.
 - <NO CAREER PLAN> if this is selected, the Generation Procedure will NOT generate Course Requests for students with a Career Plan selected in the Student Editor.
 - 'Name of Plan' if a Career Plan is selected in this field, the Generation Procedure will generate the appropriate Course Requests ONLY for students with the matching Career Plan designated in the Student Editor. It will not generate for students with no Career Plan designated.
- **Track** select the target track that Course Requests will be generated for. If you are working on Next-Year Mass Scheduling, make sure to pick the proper future track.
- **Grade** select the Grade Level to Generate Course Requests for.
 - <ANY> this selection means that Course Requests will be generated for <u>ANY Grade</u> <u>Level that is part of your selected Career Plan.</u>
 - **<UNSET>** this selection means
 - 'grade level' if a grade is selected, it will narrow down your Career Plan selection to ONLY generate Course Requests for students in the selected grade. Remember that if you are working on a future track that the students you may be used to working with will now likely be in the next higher Grade Level.
- Student Group used to designate which group of students you've selected to generate Course Requests for. If a group is selected, the Generation Procedure will <u>ONLY generate</u> requests for students in that group, based on your other Career Plan selections on this screen.

When used with 'Generate for Students with Career Plan', it will only generate Requests for the students who meet that selection criteria AND are a member of the selected group. (i.e., if you select 'General Education' as the Career Plan and then choose a group, Course Requests will only be entered for students who are BOTH a member of that group AND have 'General Education' designated in the Student Editor. Requests will not be generated for students with 'General Education' designated in the Student Editor that are not a part of that group.

When used with 'For Students with No Career Plan, Use', it will only generate Requests for the selected Career Plan, for students who do not have a Plan designated in the Student Editor, AND who are members of the selected group. It will not generate Requests for students who are not in the group.

Change Group... – click this button to make the group selection. It will launch the Group Editor. When you are in the Group Editor, you can select a group by highlighting the target group and clicking Select. Or, you can create a new group at this point and then select that group.

For Students with No Career Plan, Use - the selection made here defines which Career Plan will be used to generate Course Requests for students without a Career Plan designated in the Student Editor. This is what you would use if your school did not designate Career Plans in the Student Editor for any or all students.

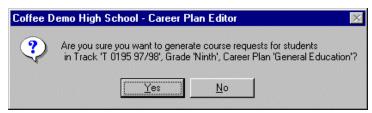
<NONE> - this selection means that for students with no Career Plan designated in the Student Editor, no Course Requests will be generated.

'Name of Plan' – select the Plan you want to use to generate Course Requests for students with NO Career Plan designated in the Student Editor. (NOTE: selecting a specific GRADE or a specific GROUP to generate Requests for may narrow this selection down.)

When used in conjunction with 'Generate for Students with Career Plan', this field will allow you to select the same course you selected above to also apply to students with no Plan designated in the Student Editor. (i.e., you can Generate Course Requests for 'General Education' for BOTH students who have that Plan designated AND for students who have no Plan designated. Students with other Plans will not be touched.

When a Plan is selected in 'Generate for Students with Career Plan', you <u>will only</u> be able to select that Plan or <NONE> from the 'For Students with No Career Plan, Use'.

- Clear Unlocked Requests Check this box to clear out any previous Course Requests in the Course Request Editor program that have been left 'Unlocked'. These might be course requests left over from a previous a Career Plan Generation Procedure (which are entered as 'Unlocked' by default), or manually entered course requests that were designated as 'Unlocked' in the Course Requests Editor. If you are 'building' one Career Plan over another (you want to keep the Requests from both Career Plans), DO NOT check this off or you will lose the previously generated, 'Unlocked' Requests. If you want to re-generate a Career Plan and blow away all of the old Requests that resulted from previous runs of the Career Plan Generation Procedure, DO check this off.
- Clear Locked Requests Check this box to clear out any previous Course Requests in the Course Request Editor program that have been left 'Locked'. These might be manually entered course requests, which are entered as 'Locked' by default. If you want to regenerate a Career Plan after you have manually gone in and added electives through the Course Request Editor, DO NOT select this or you will lose the courses that you entered manually. If you do want to blow away your manually entered Course Requests, DO check this off.
- Gen when you are finished making your selections and are ready to start the Course Request Generation Process, click on this. You will be asked if you are sure that you want to begin the process. Confirm that the information displayed is correct and click YES if it is.



Generation Process confirmation dialogue box.

As the Generation Process proceeds, a status bar will be displayed with a percent complete indicator that also displays the names of each student, as the process generates their Course Requests.

When the Process is complete, a new dialogue box will display the total number of Course Requests generated by this run of the Career Plan Generation Process. Click OK to return to the Generation selection screen.

Reset – resets all of the selections that have been made on this screen. After you run one set of Career Plan Generation selections, you may Reset, make a new set of selections, and Generate again if you please.

Done – click this when you are done generating Course Requests from the Career Plan Editor and you will be returned to the Career Plan summary screen.

What's Next?

Viewing Course Requests

The next step is to verify that the Course Requests were generated properly Course Requests that were generated by the preceding method can be viewed on a per student basis via the Course Requests Editor (generally used for next year scheduling) or the Student Schedule Editor. In either of these applications, the requests generated by the Career Plan Generation procedure may be mixed in with requests generated from other methods. Remember that there were certain other qualifiers that determine what Career Plan Course Requests will register in a student's record:

Only Course Requests that match the assigned grade level of a student will register in their Course Requests records.

Only those courses that have been assigned to a student's school and track via the Course Selection Editor will appear as Course Requests for that student. District Courses that have not been assigned to a particular school/track are not available to be taught and therefore cannot be registered as a request.

If an expected course is missing from a student's Course Requests after executing the Career Plan Generation Procedure, go back to the Course Selection Editor to verify that the course was actually assigned to the target track. Or, check the Grade field for the course in the Career Plan Editor.

For more information on these applications, please refer to the appropriate documentation.

Editing Course Requests

If changes still need to be made to Course Requests at this time, you can re-generate Course Requests through the Career Plan Editor or make changes to Requests on a student-by-student basis through the **Course Requests Editor**. Or, you can make changes to several students at the same time with the **Mass Request Changes** application.

Using Course Requests

You will now need to create a **Master Schedule** for the appropriate track(s) if you are adding Course Requests as part of the Next Year Mass Scheduling Process. You cannot schedule students until you have a Master Schedule for your track(s). Refer to that documentation for more details.

If you have a Master Schedule, your Courses Requests look good, and you are done editing / modifying them, you can move on to the **Student Schedule Editor** to Schedule students one at a time. Or, you can go to the Loader and let SchoolNet automatically schedule students into their requested courses based on the rules and parameters you will define.