SIS2000+ Training Manual

Individual Scheduling

Generate a Student's Schedule

Using the Student Schedule Editor

Prerequisites

All courses to be scheduled for students need to already be scheduled into the Master Schedule. Students need to be active in a track for scheduling.

Purpose

The Student Schedule Editor enables a user to create a student's schedule based on Course Requests or courses available in a specific period from the Master Schedule Editor.

The Student Schedule Editor is generally used by Intermediate and High Schools who tend to schedule student's one at a time, into specific Sections and Cycle Days of Courses, with different teachers for those Courses. It may be used at the elementary level, as well, for editing a single student's schedule or for scheduling an elementary student into a specific Cycle Day of a Course. But, Elementary Schools will likely use the Assign Students module more often than not.

Student Schedule Editor may be used to generate Course Requests for an individual based on a Career Plan, or by inputting specific Requests. Refer to the documentation on "Generating Course Requests" for information.

For situations in which a student enters school mid-year, the Student Schedule Editor is used, after enrolling the student into a track, to most efficiently generate Course Requests and schedule the student into courses. It is also used to make changes to a student's schedule during the course of a school year in progress.

Training Objectives

View / Edit / Add Course Requests.
Schedule individual students into Courses.
Make changes to a student's schedule.
Track down conflicts and other errors.

Launch the Student Schedule Editor

Select a Student

From the SIS2000+ Main Menu click on the **Schedule** module. From the Schedule Menu, click on the **Student Schedule Editor** button.

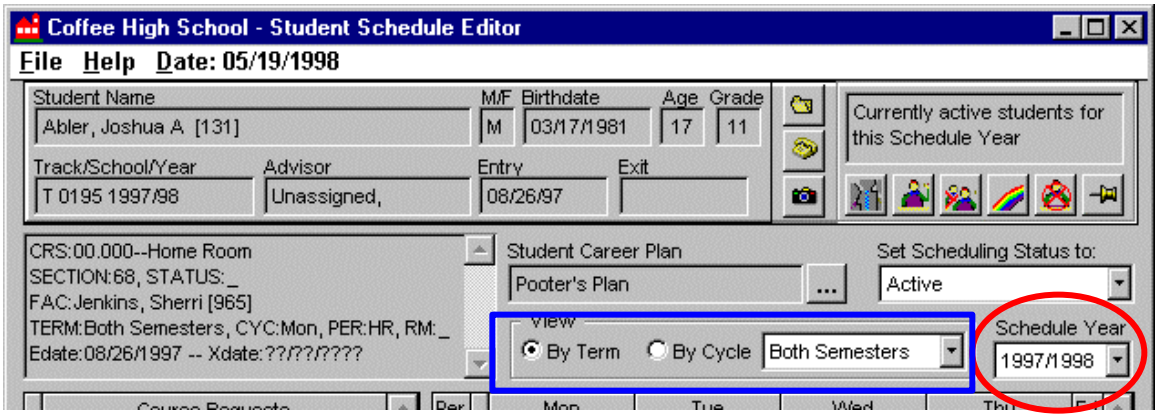
Use the **VCR buttons** or the **Find** feature to select a student to Schedule.

Set Parameters for Each Student

Select the correct enrollment period for the student if the student is enrolled in more than one track. Scroll through the entries for the student with the **VCR** buttons until the correct record is found.

Select the scheduling year for that student using the **Schedule Year** field button.

Choose to **View by Term** or **by Cycle**, and then select which Term or Cycle to view.



Top portion of the Student Schedule Editor where selection criteria are defined.

Scheduling Students into Courses

Once a student is selected, you may begin the individual scheduling process. For a student to be scheduled into a course, a Course Request must generally be added first. Once a Course Request is added, the student may then be scheduled into a section of that course, based on what was defined in the Master Schedule.

Course Requests

?? A student may be entering school in mid-year and have no Course Requests yet in the system.
?? A student may already have Course Requests generated for him or her through the Career Plan or Course Request Editor.

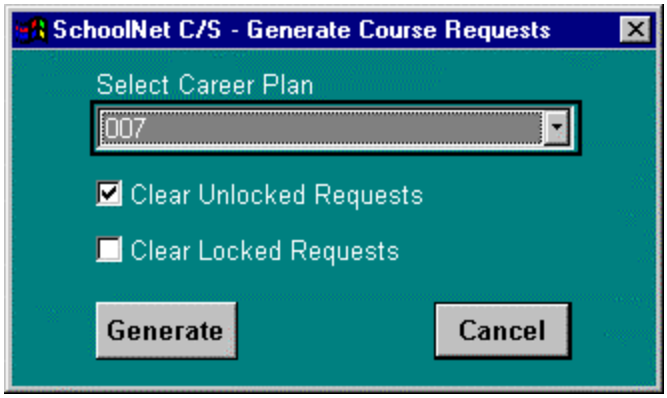
If Course Requests already exist for the student, you may proceed directly to scheduling the requests. *See* ***Scheduling a Request*** ***below.***

If no requests have been created, you may generate Course Requests through the Student Schedule Editor in two ways:

1. Using **Generate Course Requests** which may be accessed by:
   ?? clicking the **Career Plan** field button with three dots on it or
   ?? using the **File** Menu, and selecting **Generate Course Requests**

2. By clicking the **Add** button and adding a single request at a time.

Generate Course Requests



Generate Course Requests – Career Plan Generation Selections

Using this method, you will be creating Course Requests based on the selected Career Plan. For more information on Career Plans, please refer to that documentation.

Select whether or not to clear **Unlocked** and / or **Locked** Requests. Remember that '**Unlocked**' requests are generally those that are Career Plan, or 'system', generated. '**Locked**' Requests are generally requests that the user has entered individually. Refer to the documentation for the Career Plan Editor or the Course Requests Editor for more information.

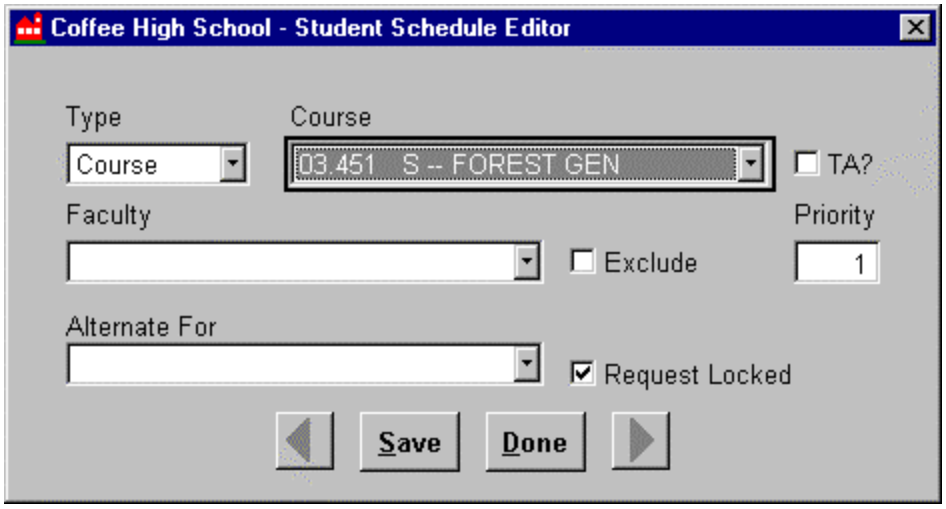
Click **Generate** to have the system add the Course Requests from your selected Career Plan to the student. Click **Cancel** to exit this procedure before generating.

If you generate requests based on a Career Plan using this method, you may wish to edit the parameters of the request. *Please refer to Editing a Request below.*

Adding and Editing Individual Requests

Selecting **Add** from the bottom of the screen will allow individual entry of a single request.

To **Edit**, highlight the request, and click the **Edit** button. The Add / Edit Course Request Screen will appear. You can use the VCR buttons on the Add / Edit screen to scroll through the requests when you click Edit.



Add / Edit Course Requests Screen

Type – select the type of request you are adding. (i.e., 'Course', 'Team', 'Group')

Course - select the Course, Team, or Group that you are adding as a request.

TA - Click **TA** if the student is requesting a position as a Teaching Assistant for the course.

Faculty - If a specific faculty member is preferred, select the name from the **Faculty** drop-down list.

Exclude - Click **Exclude** if you want to ensure a faculty member, named in the **Faculty** field, will not be scheduled for the request.

Priority - Will only affect the Schedule Loader for automated scheduling processes. You can ignore this field for mid-year scheduling purposes.

Lock - Unlock the request by clicking the check-box. Requests entered in this manner default as Locked Requests.

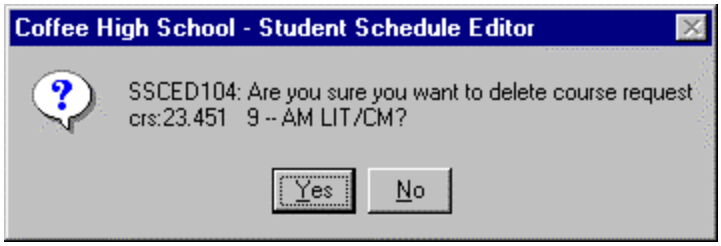
Alternate For - Indicate that this request is an alternate for another of the student's requests, if needed. The Loader generally uses this field. The choices in the list will only be Courses that have already been added as Primary Course Requests for the student.

Click **Save** to complete the process of adding / editing a Course Request. **Done** will allow you to stop this process with or without saving changes. Repeat this process for each Course Request you need to add.

Delete Course Requests

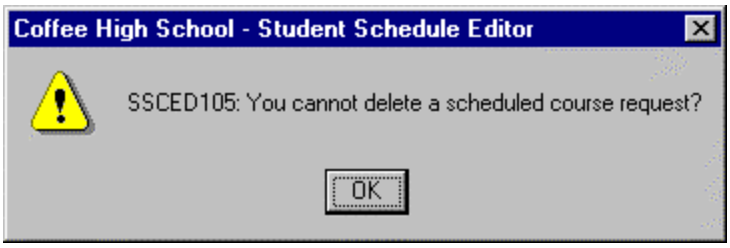
Select the request for deletion, ensuring that the entire line is highlighted in yellow and has a small black triangle in the column to the immediate left of the Course Number, and press the **Delete** button.

You will be prompted to make sure that you really want to delete a Course Request. Make the appropriate selection.



Deletion confirmation window.

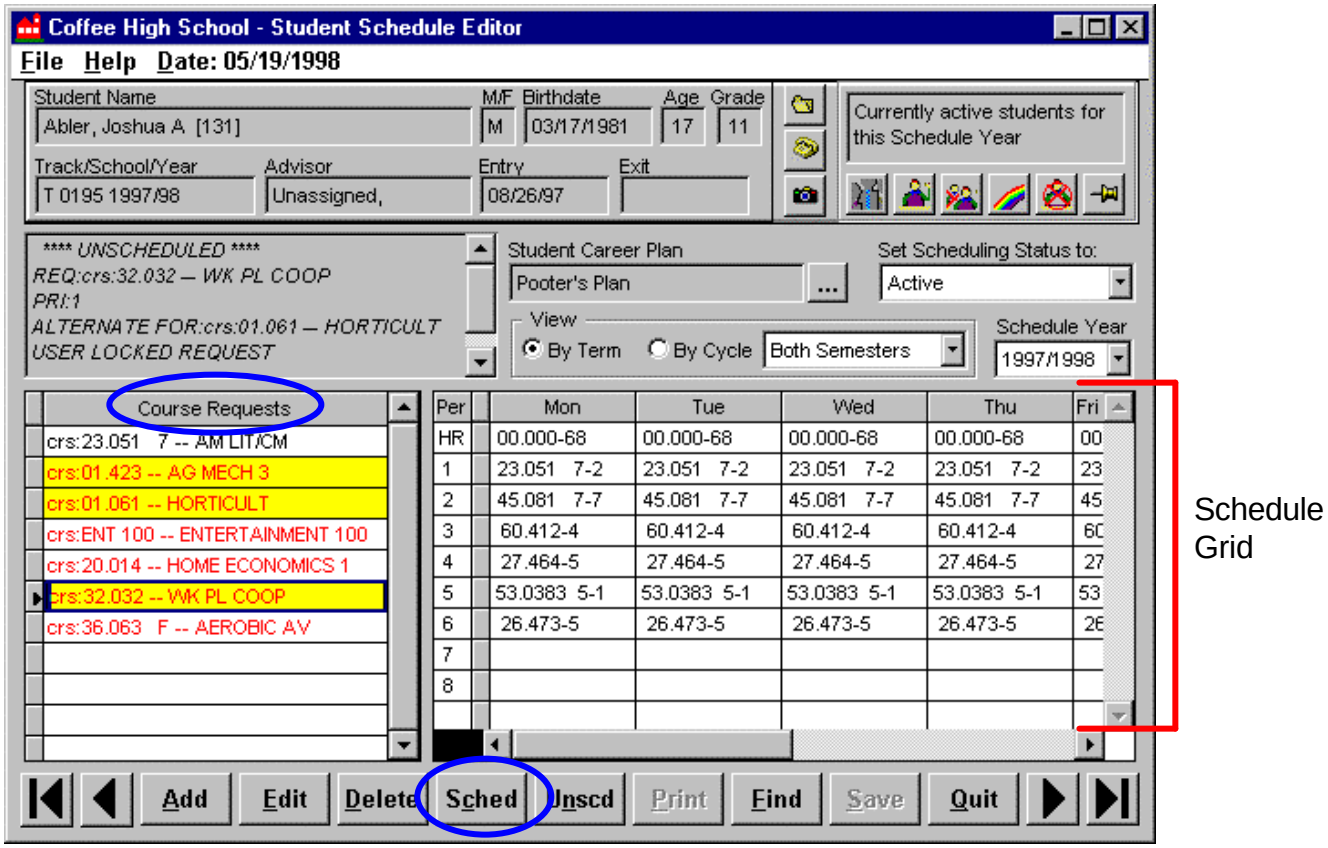
NOTE: Only those requests, which have not been scheduled, may be deleted. You will receive a message if the system will not allow you to delete a scheduled request.



To delete such a request you would have to Unschedule the students from the Course first, and then delete the Request.

Scheduling a Request

Once Course Requests have been added / edited for a student, that student may be scheduled into those courses.



Student Schedule Editor

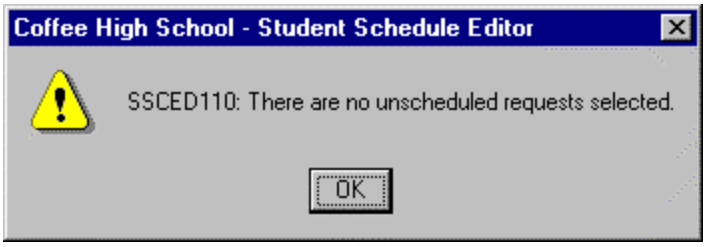
Unscheduled Course Requests appear in **red** in the column on the left. **Scheduled** Requests will appear in **black**.

- ?? 'Scheduled' means that the student has been entered into that Course.
- ?? 'Unscheduled' means that the student has either never been scheduled into the Course, or that the student was enrolled in the Course at some point, but has been exited from the Course.

To schedule **all** of the Course Requests, click the column header '**Course Requests**'. All the requests will be highlighted in yellow.

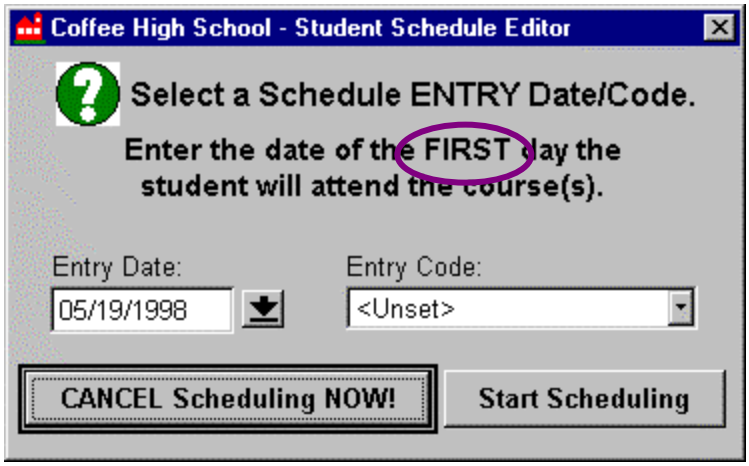
Or, to schedule **selected** Course Requests, click the desired row, or rows. The selected rows will become highlighted in yellow. After the proper selections are made, click the **Sched** button.

NOTE: You must select Unscheduled Course Requests to use the **Sched** Button. If you selected a course that was already scheduled, or did not select any courses you will receive the following message:



Click OK, make the proper selection, and try clicking Sched again.

You will then be asked to select an Entry Date and an Entry Code for the selected Courses. **Both fields are required**.



Scheduling process Entry Date and Entry Code selection screen.

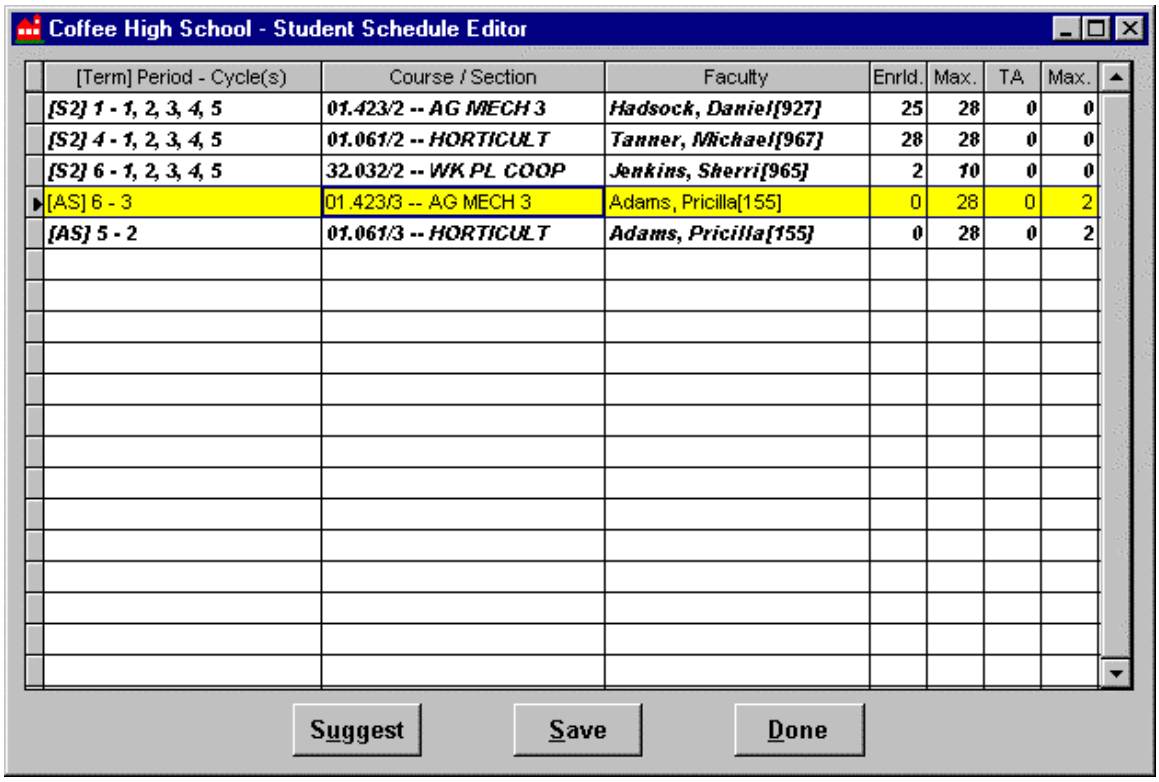
NOTE: The Entry Date of a course is inclusive. This means that a student is considered to be scheduled into a Section of a Course on the actual Entry Date. If you are scheduling a student into a course that the student will not be present in until next week, set the Entry Date to the proper future date. If the student is supposed to start the class today, leave the Entry Date as today's date.

Enter the appropriate selections and click on **Start Scheduling** to continue, or **Cancel Scheduling Now!** to abort.

The courses selected for scheduling will then appear on the Schedule Editor Selection screen. On this screen, Section information for the selected courses will be displayed showing the Term, Period, Cycle Day(s), Faculty Member, and other Course demographic information.

Course Sections that show in a 'normal' font are available to be added to a student's schedule. Courses displayed in ***Bold and Italics conflict with courses that the student is already scheduled into.*** Refer to the section on 'Course Conflicts' for more information on conflicts.

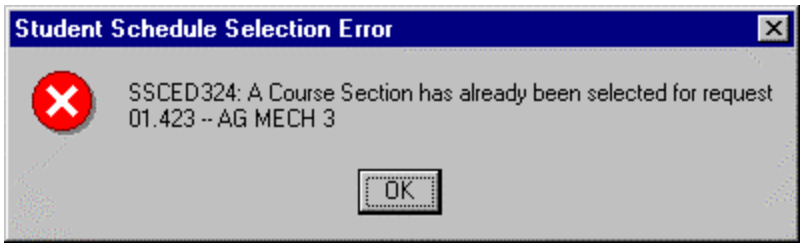
When more than one Section of a Course is available, a row for each section will appear. Select the section you want to schedule the student into by clicking on the row until it is highlighted in yellow. If you are scheduling more than one Course Request, you may also select sections of the other courses at this time as well. To de-select a selection simply click on that row again until the yellow highlight goes away.



[Term] Period - Cycle(s)	Course / Section	Faculty	Enrld.	Max.	TA	Max.
[S2] 1 - 1, 2, 3, 4, 5	***01.423/2 -- AG MECH 3***	***Hadsock, Daniel[927]***	25	28	0	0
[S2] 4 - 1, 2, 3, 4, 5	***01.061/2 -- HORTICULT***	***Tanner, Michael[967]***	28	28	0	0
[S2] 6 - 1, 2, 3, 4, 5	***32.032/2 -- WK PL COOP***	***Jenkins, Sherri[965]***	2	10	0	0
[AS] 6 - 3	01.423/3 -- AG MECH 3	Adams, Pricilla[155]	0	28	0	2
[AS] 5 - 2	***01.061/3 -- HORTICULT***	***Adams, Pricilla[155]***	0	28	0	2

Schedule Editor Selection screen after a Section has been selected to be scheduled.

When making selections, you may only select ONE SECTION for EACH Course Request. If you pick the same Course twice you will receive a message informing you that you have already made a selection for this Course Request.



Message received after selecting two Sections of the same Course Request.

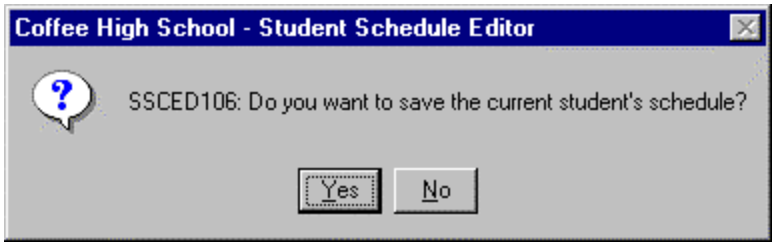
Click OK and the second Section will become de-selected (it will no longer be highlighted in yellow).

After you've made your selections, click on **Save** to actually enter the student into the Section(s). Clicking **Done** will cancel this procedure and nothing will be scheduled at this time. The **Suggest** feature has not yet been implemented.

> NOTE: This will schedule the student into ALL CYCLE DAYS of a course. If you only want the student to be enrolled into specific Cycle Days of a Course, you will have to perform this task first, and then Unschedule the student from the Cycle Days you do not want the student to be enrolled in. Refer to the Scheduling into Specific Cycle Days portion of this document for more details.

The system will return to the main screen. View the schedule. Course codes with the hyphenated section number will now appear on the column to the right in the appropriate cells. The Course Requests on the left column will turn from **red to blac**k indicating that they have been scheduled.

To finally save all of the schedule additions / changes to the database, click the **Save** button at the bottom of the main Student Schedule Editor screen. If you go to another student or click **Quit** before saving, you will be prompted to save the current changes. If you click NO, none of the additions / changes will be saved.



Message received if a student's schedule is not saved.

Unscheduling a Course

Select the student whose Course you want to unschedule.

To unschedule a course, select the corresponding request (or requests) from the Course Request list on the left, the request(s) will become highlighted in yellow, and click the **Unscd** button. Remember that you must select Course Requests that are displayed in **black** (which represents that they are currently scheduled) to be unscheduled.

You may unschedule ALL of the scheduled requests by clicking on the column header "Course Requests" to select the whole group and then clicking the **Unscd** button.

> NOTE: This method will unschedule a Course from ALL CYCLE DAYS if your School's track has more than 1 Cycle Day. Refer to the section below for details On how to unschedule from a specific Cycle Day.

You will be prompted to enter an Exit Date and Exit Code for the student being removed from the Section of the Course.

Scheduling process Exit Date and Exit Code selection screen.

> NOTE: The Exit Date of a course is inclusive. This means that a student is considered to **STILL be scheduled** into a Section of a Course on the actual Exit Date. If the student is dropping one course and adding a new one, the Exit Date of the OLD course cannot be the same as the Entry Date of the NEW course.
>
> If the student is supposed to start in the NEW course today, that course's Entry Date should be TODAY'S date. This means, though, that the Exit Date for the OLD course should be YESTERDAY'S date.

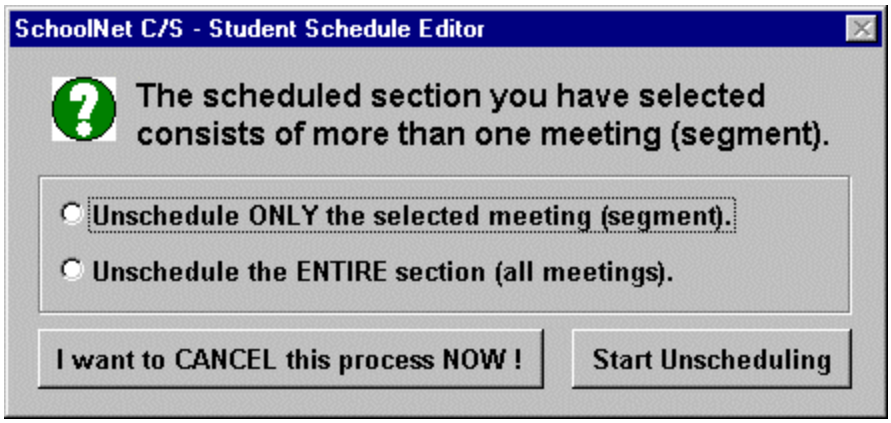
Enter the appropriate selections and click on **Start Unscheduling** to continue, or **Cancel Unscheduling Now!** to abort.

> NOTES: If the course is being unscheduled prior to saving the original scheduled request, the Course Request will be removed from the schedule on the right.
>
> If the student is "dropping" a course, and you are unscheduling the course for the current term, after having saved the originally scheduled request, the system will add an EXIT DATE to the record. This EXIT DATE will display in the course description comment area.
>
> **COURSES THAT HAVE BEEN POSTED AS "EXITED" CANNOT BE DELETED FROM THE STUDENT'S SCHEDULE.** They will be displayed with an Exit Date.
> This is the case because there could be attendance or other related data entered into the system elsewhere for the student that is related to this course information.

Segment Unscheduling (Generally Used for Unscheduling from a Specific Cycle Day)

You may also unschedule a course by clicking on that Course in the Schedule Grid. The Course will become highlighted in gray.

Click **Unsch**. You will be asked if you want to unschedule the Course from ALL Segments (which refers to schools with Courses offered on more than 1 Cycle Day), or if you only want to unschedule the selected Segment (ONLY THE SELECTED CYCLE DAY).



Segment Unscheduling selection window.

Select which task you want to perform. Choosing to unschedule from the ENTIRE section using this method is an alternate way to unschedule a Request. This choice performs the same function as selecting a scheduled Request and clicking Unscd.

After making your selection, click **Start Unscheduling** and follow the rest of the Unscheduling Process as described in the previous portion of this document.

Scheduling into a Specific Cycle Day

As mentioned earlier, the scheduling process automatically schedules students into ALL Cycle Days of a Course, as it appears in the Master Schedule.

If a student is only supposed to be scheduled into specific Cycle Days of a Course (i.e., the student is supposed to take one Course on Mondays, Wednesdays, and Fridays, and a different Course on Tuesdays and Thursdays) you will have to follow these steps:

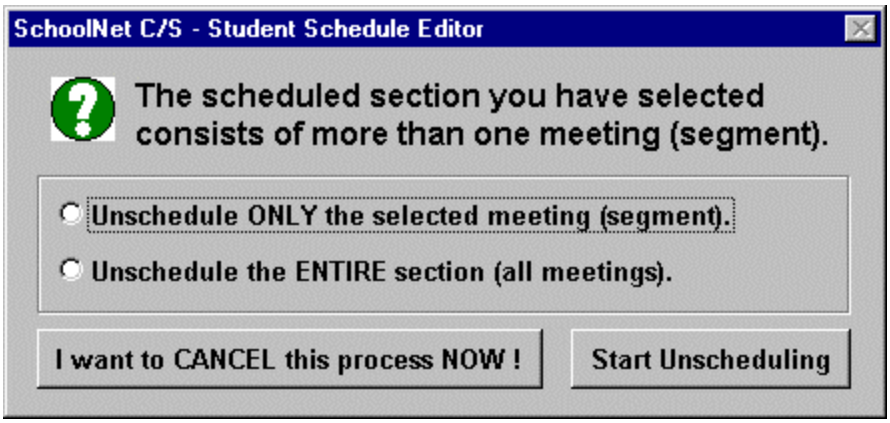
Schedule the First Course

?? Add the first Course Request.

?? Schedule that Course Request. (The system will schedule the student into ALL 5 Cycle Days of the Course given in the above scenario.)

?? Go to the Schedule grid. Click in the exact cell of the Cycle Day and Period that you DO NOT WANT THE STUDENT TO BE SCHEDULED INTO. (In other words, you are choosing the SEGMENT of a Section to unschedule.) The cell will become highlighted in gray.

?? Click **Unsch** to begin the unscheduling process. You will be asked what it is that you want to unschedule. In this case, you will choose to '**unschedule ONLY the selected meeting**' and then click on **Start Unscheduling**. (The other choice will unschedule ALL Cycle Days of the Course.)



?? Then, continue with the normal unscheduling process by entering the appropriate Exit Date and Exit Code and clicking **Start Unscheduling** again.

?? The selected Segment will now appear on the Schedule Grid with an Exit Date on that Cycle Day.

Schedule the Second Course

Before you perform these steps, you will need to go to the Master Schedule Editor and make sure that the 'Conflict OK?' flag is checked-off for the appropriate Section of the Course. (Refer to the documentation on the Master Schedule Editor for more information.) If you do not do this, the system will tell you that the second Course conflicts with the first one.

?? Add the Second Course Request. (see above)

?? Schedule that Request. (see above)

?? Unschedule that Course from the Cycle Days that the student should not be enrolled in. (see above)

The student's schedule should now show both Courses, in the proper Cycle Days, with the corresponding Entry and Exit Dates, where applicable.

Schedule a Period

Instead of beginning with a Course Request, if you need to give a student a Course for a specific period, you may schedule a period based on available Courses for that period. This can be done if a student has a 'hole' in his or her schedule that needs to be 'filled' with a Course. Rather than having to go to the Master Schedule and see which Courses are offered, which Courses do not conflict, and which Courses are not full, you can use this method to quickly 'fill-in' that gap with a valid, available Course:

?? Select to view by the cycle or term which will best enable you to select the period you need to schedule.

?? **Select the period to schedule by clicking on the appropriate cell on the schedule**. When the period is selected, the cell will become gray and a small black arrow will appear in the cell.

?? Click the **Sched** button. Select the appropriate Entry Date and Entry Code and then click **Start Scheduling**. The list of available Course Sections will appear.

?? Select the course/section to schedule by clicking on the appropriate row.

?? Click the **Save** button.

?? The newly scheduled course will be displayed in the schedule.

?? The student's schedule will need to be saved when you have completed all work to the schedule. Click the **Save** button at the bottom of the screen.

Resolving Scheduling 'Problems' and Course Conflicts

Scheduling 'problems' and conflicts may occur for a number of reasons. Most of those reasons being that a part of the set-up process was accidentally overlooked or data was entered incorrectly. Some common things to look for when 'problems' or conflicts occur in scheduling are listed below.

You Can Not Find a Course to Request or to Schedule

If you cannot seem to find a Course to add as a Request, or can not find a Section of a Course to schedule, step backwards through the Scheduling Set-Up Process to track down the possible cause:

?? Check that the course is assigned to a faculty member. Make sure, in **the Master Schedule Editor**, that the course appears in the grid for that particular faculty member in the period(s) and cycle(s) you are working on; **and that it meets in the proper term**. If the course is not there you need to add it to that faculty member using this module. If you cannot find the Course here, go to the next step.

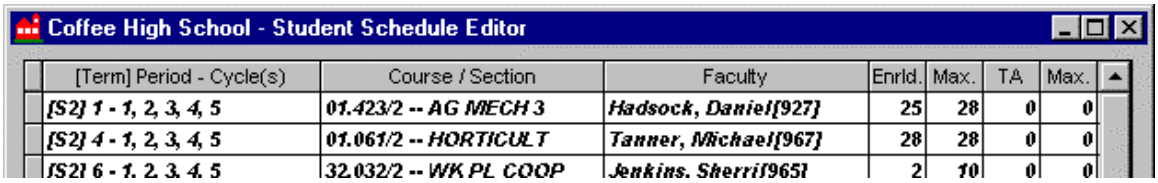
?? Check that the course has been selected for your school. In the **Course Selection Editor**, check and see that the course you are working with appears in the column on the right, which represents the courses available for your school. If the course is not there, move it over from the column on the left. If you cannot find the Course in the column on the left, go to the next step.

?? Go into the **District Courses Editor**, under the System Menu, and see if the Course is listed there. If it is, **check that the Term Duration field is filled in properly**, and that the other fields look correct as well. If you cannot find the Course here, you will have to add it to your database at this point. Refer to the District Courses documentation for details.

Course Conflicts

Conflicts Due to Another Scheduled Section:

Course conflicts may occur when two or more Course Requests for a student fall in the same period, term and cycle day. When these conflicts occur, the system will warn you of the conflict by presenting the conflicting Course Requests in ***bold and italics*** on the Schedule Editor Selection Screen.

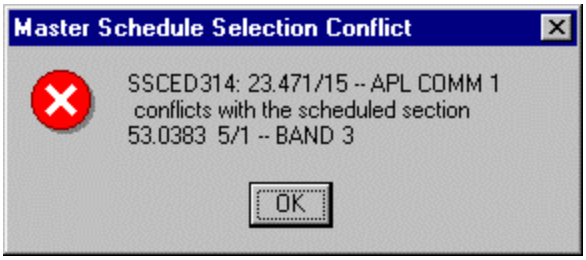


Coffee High School - Student Schedule Editor

[Term] Period - Cycle(s)	Course / Section	Faculty	Enrld.	Max.	TA	Max.
[S2] 1 - 1, 2, 3, 4, 5	***01.423/2 -- AG MECH 3***	***Hadsock, Daniel[927]***	***25***	***28***	***0***	***0***
[S2] 4 - 1, 2, 3, 4, 5	***01.061/2 -- HORTICULT***	***Tanner, Michael[967]***	***28***	***28***	***0***	***0***
[S2] 6 - 1, 2, 3, 4, 5	***32.032/2 -- WK PL COOP***	***Jenkins, Sherri[965]***	***2***	***10***	***0***	***0***

Course Requests that conflict with an already scheduled course.

If you attempt to highlight that Section to schedule it, you will receive a conflict message:



When you encounter a conflict due to another scheduled course, you can do one of two things:

Not Allow the Conflict (The student should ONLY BE SCHEDULED INTO ONE of the COURSES):

Determine which of the courses in conflict is the priority, or whether there is another section the student could take instead. Use the Student Schedule Editor to unschedule and re-schedule courses to resolve any conflicts.

Allow the Conflict (The student NEEDS TO BE SCHEDULED INTO BOTH OF THE COURSES AT THE SAME TIME):

You need to check that the course is set-up to allow scheduling conflicts. If it is not, the program will not allow you to schedule the second course. This is done in the Master Schedule.

Go to the **Master Schedule Editor**, select the faculty member and click on the course you are working on. Then click Edit. On the screen that comes up, check-off the "Schedule Conflict OK?" box and this will allow you to schedule this section of the course at the same time as another class.

These changes affect all cycle days for the period you selected, but they do not change other periods of the same class. You will need to go into one meeting of each period to make these changes.

You can then **re-launch the Student Schedule Editor** and schedule both Courses at the same time.

Conflicts Due to Entry/Exit Dates:

The Entry and Exit Dates of a course are inclusive. This means that you could receive a conflict message when you are attempting to replace an Unscheduled course with a new Course. The Entry Date of the NEW course cannot be the same as the Exit Date of the OLD course.

The Exit Date for the OLD course includes the student in that course on the selected day. The Entry Date for the NEW course also includes the student in the NEW course on the selected day. That is why the dates of the two courses cannot overlap.

When you encounter a conflict due to another scheduled course, you can do one of two things:

Change the Entry Date of the New Course:

Click OK to clear any conflict warning messages. Select the Course Request and click **Sched** again. This time, use an Entry Date that falls after the Exit Date of the Exited course you are replacing.

Change the Exit Date of the Old Course:

If the Entry Date of the New Course absolutely needs to be the date you entered that gave you a conflict message, you can change the Exit Date of the Old Course instead.

Go to the **Change History** module under the Scheduling Menu. Find the proper student and select the course whose Exit date you want to change. Click Edit, and go to the Exit Date field and change the date to an appropriate date prior to the Entry Date of the New Course.

You can then re-launch the Student Schedule Editor and schedule the New Course with the Entry Date that you wanted to use.

What's Next?

This could be the final step in your scheduling process if you have already run the Loader or were using the Student Schedule Editor to make individual changes before school starts or during the school year. You will likely now move on to printing Student Schedules and Class Rosters to hand out to faculty and students.

If you have come to the Student Schedule Editor before running the Loader, you may want to print out the some of the Scheduling Reports for the students you scheduled or changed schedules for to ensure that the proper changes or additions were made. You can then go to the Loader.

You will return to the Student Schedule Editor throughout the school year, as students need to make changes to their schedules. You may also return for individual scheduling needs after the Loader has been run.