



Master Schedule: Flex Scheduling for Next Year

Trainer: Carole Williams



Key Topics

Overview and Terminology

Timeline

Preparation and setup – these may not be your responsibility!

Scheduling Process Dashboard

Scheduling Setup page

Course Requests

Reports

Build a Scheduling Master Schedule (SMS)

More reports

Schedule Students

Even more reports

Where to go for more information



Student Scheduling for Next Year: Overview

What is “scheduling for next year”?

The planning process for, and the creation of, the Master Schedule for the next school year.

There are three major steps in the process:

1. Gather Course Requests	Find out what courses next year’s students will take. Recorded in the SSS table (Course Requests).
2. Build the Scheduling Master Schedule	Create a planning schedule (the Scheduling Master Schedule or SMS), which contains all the sections for the Courses that students will take next year. Recorded in the SMS table.
3. Schedule Students	Let Aeries schedule the students into the sections (run the Scheduler) and/or hand schedule students into sections.

Student Scheduling for Next Year: Terminology

	In use this year	For use next year
 School	Master Schedule (MST): the sections (classes) in the current year at your school	Scheduling Master Schedule (SMS): the sections (classes) that will be in the Master Schedule next year Max (SMS.MX): the maximum number of students in a section (note: SMS.MX = 0 means no students will schedule into the section)
 Student	Classes (SEC): the list of sections a student is taking during the current year	Course Requests (SSS): the list of Courses each student will take next year. When a Course Request is “scheduled,” that means a specific SMS section is recorded for the Course Reject: if a student does not schedule into a section (plus why)
 Curriculum; subject; what is being taught	Grade Level: STU.GR	Grade Level Next Year: STU.NG Courses (CRS): used by all schools in the district

Scheduling Timeline

January	February	March	April	May	June	July	August	September
<p>Start planning for next year. Will there be any adjustments to curriculum? Will you change any existing Courses? Will you offer new Courses?</p>	<p>Copy feeder schools' student records as Pre-Enrolled (STU.TG = *)</p> <p>Scheduling Setup</p> <p>Flex schools: Flex Periods setup; Class Calendars setup</p>	<p>Gather Course Requests; analyze Course Request reports</p> <p>Create Scheduling Master Schedule (SMS); analyze SMS reports</p>	<p>Run the Scheduler; analyze scheduling reports; adjust the SMS to increase the percentage of students scheduled by the Scheduler</p>		<p>New Year Rollover</p> <p>Summer Break</p>	<p>Re-run the Scheduler; continue adjusting the SMS to increase the percentage of students scheduled by the Scheduler</p> <p>Copy SMS to MST</p> <p>Hand schedule; manage rejects; update Class Calendars</p>	<p>Print Locator Cards; make any changes to the schedule in the Master Schedule (MST)</p>	

Also see the Master Schedule timeline article:

<https://support.aeries.com/support/solutions/articles/14000133635-master-schedule-timeline>

Setup: Staff

- This is an HR/district level task; it may not be your responsibility!
- Staff table (STF) is district-wide
 - One Staff record
 - One or multiple schools
- Sections need Section Staff (teacher)
 - Section Staff won't display unless a Staff record exists
- On Staff page, Scheduling Info (SSI table) stores Room and Max Stu/Period
 - Both will "flow" into section with the Section Staff if data exists in SSI
- On Staff page, Job Assignments (STJ) is reported to the state
 - If Staff record exists, but the Section Staff still doesn't display to add to the section, check to see if they have a Job Assignments record for the school

Scheduling Info (SSI)
+ Add New Scheduling Info
^

	School	Room	Low Grd	High Grd	Max Stu/Period	Max Stu/Day
	Flex Soaring Eagle High School	T23	9	10	34	0
	Screaming Eagle High School	A-11	9	9	32	0

+ Add New Record

Master Schedule Classes (MST)
0 Records
v

Scheduling Master Schedule Classes (SMS)
0 Records
v

Associated Teacher Records (TCH)
+ Add New Teacher Record
0 Records
v

Job Assignments (STJ)
+ Add New Job Assignment
^

	Job Classification	FTE	Start Date	End Date	School (if other than Screaming Eagle High School)
	<u>Teacher (12)</u>	<u>80.00</u>	<u>_____</u>	<u>_____</u>	
	<u>Teacher (12)</u>	<u>20.00</u>	<u>_____</u>	<u>_____</u>	Flex Soaring Eagle High School

+ Add New Record

Setup: Create Pre-Enrolled Students

- If you are a new implementation district, you do not need to do this in your first year
- This is an Aeries Admin district-level type thing; it may not be your responsibility!
- Why? To add “pre-enrolled” student records to your school (students in the highest grade levels at your feeder schools)
- Pre-enrolled records can then be used for scheduling
- Query first to check the feeder schools’ data:
LIST STU ID LN FN TG GR NG SC NS IF GR = 5 AND TG = ‘ ‘
- NG should be 6 in this example, for students who are not being retained
- NS should be the middle school
- Demographics page: STU.NG and STU.NS

Next Schl	Next Grd
Bald Eagle Intermediate School (993)	6

Query

LIST STU ID LN FN TG GR NG SC NS IF GR = 5 AND TG = ' '

Query Results - Google Chrome

training2.aeries.net/CW/Aeries/QueryDisplayBasic.aspx

Keep Students

Studen...	Last N...	First N...	Tag	Grade	Next G...	School	Next S...
99100001	Acevedo	Arturo		5	6	991	0
99601171	Adkins	Jasmine		5	6	996	0
99000003	Aguilar	Jonathan		5	6	990	0

Create Pre-Enrolled Students

Schools

Schools to Copy From: All/None

889 Steller's Jay Elementary School

894 Flex Soaring Eagle High School

Schools to Copy To:

887 Raven Middle School

889 Steller's Jay Elementary School

Setup: School Options

This is an “Aeries Admin” task; it might not be your responsibility!

At Flex schools using Period Attendance:

If you are scheduling in the current year database (2024-25) and Scheduling for Next Year, **DO NOT CHANGE** the School Options page, since the options control the current year’s database.

After the New Year Rollover, in the 2025-2026 database, verify these fields:

- **All Day Attendance Management:** Manual
- **Schedule Type:** Flexible (3)
- **Track Primary Classes for Students:** No
- **Use Staff in Sections:** Yes
- **Att Type:** Period
- **Use Staff ID Based Counselor Tracking:** Yes

School Options Edit							
Code	School Name	Area	Telephone	Fax	Open Date	Close Date	Tag
894	Flex Soaring Eagle High School	999	5559994		7/11/2007		
Street Address		City	State	Zip	Extn	Country	DNR
6336 Eagle Crag Lane		Eagle Rock	CA	95994		US	<input type="checkbox"/>
Principal's Name	Signature	Email Address	ID Type	County	District	School	Charter
Mr Don Wilson	<input type="checkbox"/>		1	65	99999	9999894	
Low Grade	High Grade	Attendance Period	All Day Attendance Management			Tracks	
9	12	0	Manual			0	
School Website				Short Name			
User1	User2	User3	User4	User5	User6	User7	User8
Scheduling Type	Track Primary Classes for Students	Use Staff In Sections	School Category	Utilize A/B Days	Session Type		
Flexible (3)	No	Yes		Don't use A/B Days (0)	Regular (0)		
Att Type	Att Reporting	Schedule Basis	Education Type				
Period (1)	Negative (0)	Semester (0)	Not Alternative Ed (0)				
Portal Confirmation Email Address	Next Year Start Date	Auto Assign Teacher Number	College Board School Code				
DoNotReply@aeries.com		No	123894				
Intervention Referral Settings							
Referral Submission Notification Email Address(s):							
Referral Approval Notification Email Address(s):							
Bullying Incidents	Cyber Bullying Incidents	Allow Issue Credit on Classes / Course Attendance pages	Use Grading Periods Instead of Terms in Gradebook				
		No	No				
Use Staff ID Based Counselor Tracking							
Yes							

Setup: Portal Options

- This is an “Aeries Admin” task; it may not be your responsibility!
- If you are scheduling in the current year database (2024-25) and Scheduling for Next Year, **DO NOT CHANGE** the Portal Options page yet, since this page controls the options for **this** year.
- After the New Year Rollover, Portal Options can be changed.
- Portal Options’ Attendance tab controls how teachers are allowed to take attendance: lots of options here!
- **Attendance to be Taken (Marked as Complete) by Section** must be checked in a Flex school, in order for the Attendance Submission Log to display correctly.
- The Attendance Submission Log displays which teachers have (or have not) taken attendance.

Attendance
Contacts
Grades
Gradebook
PFT
Scheduling
Miscellaneous
Parent Data Changing

Default
Independent Study Att
Attendance Ruleset 2

Date Ranges	Other Attendance Options	
# Days Teachers Can Back Post Attendance: <input style="width: 40px;" type="text" value="0"/>	<input checked="" type="checkbox"/> Enable Lunch Count	
# Days Teachers Can Forward Post Attendance: <input style="width: 40px;" type="text" value="0"/>	<input type="checkbox"/> Disable Attendance if Site Is External (set via AppSettings)	
# Days To Display Add & Drops: <input style="width: 40px;" type="text" value="5"/>	<input type="checkbox"/> Take Attendance For Each Period in a Blocked Section (MST.BL) <small>When this option is on, attendance must be taken for every period of a blocked section. If Off (default), attendance taken in the main period will be applied to all the periods in that section's block.</small>	
# Days Teachers Can Back Post Attendance Note: <input style="width: 40px;" type="text"/>	<input type="checkbox"/> Allow teachers to override verified absences. <small>NOTE This has attendance auditing complications!</small>	
# Days Teachers Can Forward Post Attendance Note: <input style="width: 40px;" type="text"/>	<input type="checkbox"/> Only Allow Teachers to Override Attendance Codes listed.	
# Days Teachers Can Back Post Attendance to Remote Instruction Days According to the Class Calendar: <input style="width: 40px;" type="text"/>	<input type="checkbox"/> Teachers can Add & Update Attendance Note.	
# Days Teachers Can Forward Post Attendance to Remote Instruction Days According to the Class Calendar: <input style="width: 40px;" type="text"/>	<input checked="" type="checkbox"/> Teachers Can View Attendance Notes Added by Others.	
Attendance Codes		
Description	Code	Allow Mass Apply?
Unverified Absent (usually "A")	<input style="width: 20px;" type="text" value="A"/>	<input type="checkbox"/>
Tardy (usually "T")	<input style="width: 20px;" type="text" value="T"/>	<input type="checkbox"/>
Present (usually "P")	<input style="width: 20px;" type="text"/>	<input type="checkbox"/>
Additional Att Code 1	<input style="width: 20px;" type="text"/>	<input type="checkbox"/>

Allow Teachers to Setup Seating Charts Before Attendance is Initialized
 Require clicking the 'Attendance Complete' button to Complete taking attendance
 Lock Teacher Attendance for a class after the teacher clicks the 'Attendance Complete' button
When this option is on, the Attendance to be Taken (Marked as Complete) by Section option will also be enabled.
 Custom text for 'Attendance Complete' button

 Attendance to be Taken (Marked as Complete) by Section

Setup -- Security (Permissions) Documentation:

Flex Scheduling:

<https://support.aeries.com/support/solutions/articles/14000108487-flex-scheduling-security>

The screenshot displays the 'Group Information' section for a group named 'Counselors'. Below this, there are buttons for 'Add', 'Change', 'Delete', and 'Print Effective Permissions'. The main part of the interface is the 'Permissions - Counselors' window, which is set to 'Current Year (2022-2023)'. A checkbox 'Display Current Permissions (Uncheck to Show All Permissions)' is checked. The permissions table below shows the following data:

Table/Program Area	Query Tbl	Query				Mass			Expiration Date (Read will not expire)
		Read	Insert	Update	Delete	Update	Administer	Fields	
Scheduling									
Course Data	CRS	✓	□	□	□	□	□	□	□
Career Pathway Courses	CCP	✓	□	□	□	□	□	□	□
College Articulations	CCC	✓	□	□	□	□	□	□	□
Course Fees	CRF	✓	□	□	□	□	□	□	□

Setup -- Security: Users/Groups will need permissions:

If scheduling using SSS/SMS:

SSS – Course Requests
SMS – Scheduling Master Schedule
SSM – Section Staff Members
*CRP – Course Request Packets
*SPK – Section Packets
*SMP – SMS Section Packets
SED – Scheduling Exclusions
*SWL/AWL – Wait Lists
*CRQ – Courses that can be chosen on the Portal

Scheduling using SEC/MST (current year):

SEC – Current sections
MST – Master Schedule
SSE – Section Staff Members
*CRP – Course Request Packets
*SPK – Section Packets
*MSP – MST Section Packets
CAR – Course Attendance Reporting

Schedulers
* typically for
secondary level

FTF – Flex Periods
(includes FTT – Flex Period Times)
CCL – Class Calendar
(includes CCD – Class Calendar Dates)

FTF – Flex Periods
(includes FTT – Flex Period Times)
CCL – Class Calendar
(includes CCD – Class Calendar Dates)
BSD – Bell Schedule Definitions

Bell Schedulers

Additionally, other data will need to be maintained by appropriate personnel:

STF – Staff Data
SSI – Staff Scheduling Information

STF – Staff Data
SSI – Staff Scheduling Information

Specific areas used in
scheduling and other places

CRS – Courses

CRS – Courses

DAY -- an Aeries admin or a user with DAY permissions (school Calendar) can link a Custom Bell Schedule to Calendar dates.

Scheduling Process Dashboard

⊕ Scheduling Process Dashboard

A. Setup / Config

- * Backup and Restore Scheduling Results **Make some progress and/or you're about to make a big change? Back it up. Messed something up? Restore!**
- 1. Scheduling Setup **Tell Aeries what to do with the scheduling tables (SMS and SSS)**
- 2. Courses **New Courses? Changes to existing Courses? Update the course records (CRS)**
- 3. Course Request Packets **New Course Request Packets? Changes to existing Course Request Packets? Make the changes now**
- 4. Course Request Section Packets **New Course Request Section Packets? Changes to existing Course Request Section Packets? Make the changes now**
- 5. Update Course Request Options **Create the list of Courses that parents and/or students can choose from to select Course Requests on the Portal**
- 6. Portal Options - Scheduling Tab **Set the dates for when parents/students can use the Portal to add Course Requests**
- 7. Flex Periods **At what times should sections meet? Set the times for Flex Periods**
- 8. Class Calendars **On what dates should a section or sections meet? Set the dates for Class Calendars**

Also, make sure that:

- STU.NG (Next Grade) and STU.NS (Next School) are correct for your students and your feeder school students
- Pre-enrolled records are created in your school, for the students who are coming from feeder schools: Create Pre-Enrolled Students page

B. Course Requests

- * **Backup and Restore Scheduling Results** Made some progress? Back it up! Messed something up? Restore!
- 1. **Import Course Requests from Academic Plan** Easy mass add of course requests, if your school uses the AP.
- 2. **Mass Change or Add Course Requests** Mass drop, change, add course requests/course request packets.
- 3. **Student Course Requests** Drop, change, add course requests/course request packets/scheduling exclusions for a single student.
- 4. **Delete Duplicate SSS Records** Delete unwanted duplicate course requests.
- 5.  **Students With More or Less Than N Course Requests** Find students with too many/too few course requests.
- 6.  **Students With No Course Requests** Find students with no course requests.
- 7.  **Scheduling Reverse Verification Listing** For each course, see the list of students who are requesting it.
- 8.  **Scheduling Course Request Listing** For each student, see their list of course requests.
- 9.  **Scheduling Course Request Tally** For each course see the total number of requests (see how many sections you need per course).
- 10. **Scheduling Course Request Letter Text Editor** Add/edit the wording for the letter home (includes the student's list of course requests).
- 11.  **Scheduling Course Request Letter to Parent** Print letter to tell parents the courses the student is requesting.

C. Build Scheduling Master Schedule

- * **Backup and Restore Scheduling Results** Made some progress? Back it up! Messed something up? Restore!
- 1. **Scheduling Master Schedule** Create/edit/delete a section.
- 2. **SMS Board** View the schedule, move/copy/edit sections, and don't forget the SMS Builder. And more . . .
- 3.  **Scheduling Conflict Matrix** Which course's sections should/should not be during the same period?
- 4.  **Scheduling Master Schedule Errors** Within a course, sections should have same term length/split term for the scheduler to run.
- 5. **Create SMS Teacher Aide Sections** Add a TA section for every existing section
- 6. **Create Sections for Next Term** Add Spring sections to "match" the Fall sections (relies on CRS.NC)
- 7.  **Room Availability Report** Matrix of rooms + sections (relies on SMS.RM)
- 8.  **Scheduling Master Schedule** Sort different groups of sections and compare them (try By Course and Period)
- 9.  **Scheduling Master Schedule Board** Print the schedule (or just go look at the SMS Board)
- 10.  **Scheduling Master Schedule Details** Print each section and its details
- 11.  **Prescheduling Edit Listing** Run before scheduling: students who won't completely schedule and why
- 12.  **Scheduling Course Request Analysis** Courses + seats short, number/percentage of rejects

- Also: add Complex Schedules "tags" to students and sections if needed

Scheduling Process Dashboard

D. Schedule Students

- * Backup and Restore Scheduling Results **Made some progress? Back it up! Messed something up? Restore!**
- 1. Mass Change Section Numbers **Quickly move students between sections (can also be used to quickly add sections)**
- 2. Schedule All Students **Plus KEEP/SKIP, lock schedules, lock mass scheduling**
- 3. Course Requests / Schedule **Add/edit/delete course requests and schedule, one student at a time**
- 4.  Scheduling Course Request Analysis **Courses + seats short, number/percentage of rejects**
- 5.  Scheduling Class Load Analysis **Sort/compare different groups of sections and compare them (helpful for balancing)**
- 6.  Scheduling Class Load Averages **Average requests per section**
- 7.  Scheduling Reject Analysis Listing **Every student with a rejected course request + why + their schedule**
- 8.  Students With Double Periods **SSS option; students with two sections in the same period and term**
- 9.  Students With Incomplete Class Schedules **SMS/SSS option; who has empty period(s) or gap in schedule?**
- 10.  Students With More or Less Than N Periods **SMS/SSS option; who has more/less than specified number of scheduled periods**
- 11.  Students With UnBalanced Academic Weight **SMS option; relies on CRS.AC = 0 - 4; scheduler option**
- 12. Scheduling Optimizer **Final scheduling process before hand-scheduling; tries to schedule students with rejects**
- 13. Scheduling Letter Text Editor **Add/edit the wording for the letter home (includes the student's schedule)**
- 14.  Scheduling Letter to Parents **Print a letter home to tell the parents the student's schedule**
- 15.  Summary of Students by Teacher and Period **SMS option; matrix of teachers' loads by period/term**
- 16.  Student Locator Cards **Print student schedules**

E. Finalize

1. Copy Scheduling Results to SEC & MST Roll the SSS/SMS to the SEC/MST
2. Populate MST.HQT from STH STH info --> MST.HQT (legacy?)

One more section exists in the Scheduling Dashboard: F. Current Master Schedule. That section is current year scheduling: Classes and Course Attendance pages.

Typical Scheduling Setup at Flex Secondary, if starting from scratch:

1. Selections:

- Use Flex Scheduling for Next Year (unless you're already in the "next" year, in which case you'd select Scheduling students into classes for the current school year)
- Use Staff-Section Association instead of Teacher Numbers(TN) with SMS Sections
- Blank out the SSS Table (typically)
- Blank out the SMS Table

2. Press **Initialize Scheduling**

3. Make a backup: blank "Starting Point"

Another Note: if an MST exists, instead of "starting from scratch," you could copy the current Master Schedule to the SMS and modify as needed (see next slide).

Scheduling Setup Options

Scheduling Status

- Scheduling Tables are Inactive
- Scheduling students into classes for the current school year
- Use Flex Scheduling for Next Year

Scheduling Options

- Do NOT allow an Alternate Course Request that has already been selected as a primary or alternate request
- Allow Wait Lists for Master Schedule Sections
- Allow Wait Lists for Scheduling Master Schedule Sections
- Delete Wait List records when a student is scheduling into a matching course
- Use Staff-Section Association instead of Teacher Numbers(TN) with SMS sections
- Track Primary Classes for Students for Next Year

SMS & SSS Initialization

Course Requests

- Do Nothing with the SSS Table
- Blank out the SSS Table
- Copy current student classes to SSS table, keep as prescheduled.
- Copy current student classes as course requests only.

Scheduling Master Schedule

- Do Nothing with the SMS Table
- Do Nothing with the SMS Table, but Copy Flex Periods (FTF)
- Blank out the SMS Table
- Copy current master schedule (MST) table to the new SMS table.

Scheduling Wait List

- Do Nothing with the SWL Table
- Blank out the SWL Table
- Copy current Scheduling Wait List (AWL) to SWL

Select which terms to copy:

- Year Long Classes
- Fall
 - Quarter/Trimester 1
 - Quarter/Trimester 2
- Spring
 - Quarter/Trimester 3
 - Quarter/Trimester 4

Flex Scheduling Using Next Year's Grade Levels!

Initialize Scheduling

How to Copy the MST to the SMS on the Scheduling Setup Page (if an MST exists)

1. In SMS & SSS Initialization, select **Blank out the SMS Table**. Typically, you'd also **Blank out the SSS Table**, (Course Requests).
2. Press **Initialize Scheduling** button.
3. After receiving the email indicating the process ran, return to the **Scheduling Setup** page.
4. In SMS & SSS Initialization, select **Copy current master schedule (MST) table to the new SMS table**.
5. Press **Initialize Scheduling** button. After receiving the email indicating the process ran, proceed with SMS modifications.

SMS & SSS Initialization

Course Requests

- Do Nothing with the SSS Table
- Blank out the SSS Table
- Copy current student classes to SSS table, keep as prescheduled.
- Copy current student classes as course requests only.

Scheduling Master Schedule

- Do Nothing with the SMS Table
- Do Nothing with the SMS Table, but Copy Flex Periods (FTF)
- 1** Blank out the SMS Table
- Copy current master schedule (MST) table to the new SMS table.

Select which terms to copy:

- Year Long Classes
 - Fall
 - Quarter/Trimester 1
 - Quarter/Trimester 2
 - Spring
 - Quarter/Trimester 3
 - Quarter/Trimester 4

Flex Scheduling Using Next Year's Grade Levels!

2 Initialize Scheduling

SMS & SSS Initialization

Course Requests

- Do Nothing with the SSS Table
- Blank out the SSS Table
- Copy current student classes to SSS table, keep as prescheduled.
- Copy current student classes as course requests only.

Scheduling Master Schedule

- Do Nothing with the SMS Table
- Do Nothing with the SMS Table, but Copy Flex Periods (FTF)
- Blank out the SMS Table
- 4** Copy current master schedule (MST) table to the new SMS table.
 - How would you like to handle Inactive MST records?
 - Copy them, but leave them inactive
 - Do Not Copy Inactive Sections
 - Copy and Activate them
 - Copy them, but Activate certain codes

Select which terms to copy:

- Year Long Classes
 - Fall
 - Quarter/Trimester 1
 - Quarter/Trimester 2
 - Spring
 - Quarter/Trimester 3
 - Quarter/Trimester 4

Usually, when copying the MST to the SMS, all term's sections should be copied.

Inactive sections exist in my MST. Should they be copied along with the active sections? In this example, no.

Flex Scheduling Using Next Year's Grade Levels!

5 Initialize Scheduling

Scheduling Setup: More Details

Scheduling Setup is the very start of the scheduling process. What are we doing?

1. Telling Aeries how we are going to schedule.
2. Telling Aeries what to do with the Course Requests (SSS) table and the Scheduling Master Schedule (SMS) table, which contain last year's data at this point.

To make changes on this page, Admin to SMS permissions are required.

When scheduling for next year, STU.NG (Next Grade) field is used for a student's Grade Level.

Scheduling Setup Options

Scheduling Status

- Scheduling Tables are Inactive
- Scheduling students into classes for the current school year
- Use Flex Scheduling for Next Year **Choose if you are using Flex scheduling. Grade Level next year (STU.NG) will be used for student's grade level.**

Scheduling Options

- Do NOT allow an Alternate Course Request that has already been selected as a primary or alternate request **Alternate Course Requests will need to be a different course from the Primary Course Request.**
- Allow Wait Lists for Master Schedule Sections
- Allow Wait Lists for Scheduling Master Schedule Sections **Wait Lists can be used when student wants to be scheduled into a particular section, but can't because the section is full.**
- Delete Wait List records when a student is scheduling into a matching course
- Use Staff-Section Association instead of Teacher Numbers(TN) with SMS sections
- Track Primary Classes for Students for Next Year **For Flex Elementary.**

SMS & SSS Initialization

Course Requests

- Do Nothing with the SSS Table
- Blank out the SSS Table **In this example, SSS and SMS tables are being blanked out: starting fresh.**
- Copy current student classes to SSS table, keep as prescheduled.
- Copy current student classes as course requests only.

Scheduling Master Schedule

- Do Nothing with the SMS Table
- Do Nothing with the SMS Table, but Copy Flex Periods (FTF)
- Blank out the SMS Table **"Do nothing" keeps the existing data in the SSS and SMS tables. Note that at the start of scheduling, last year's data will be in those tables.**
- Copy current master schedule (MST) table to the new SMS table.

Scheduling Wait List

- Do Nothing with the SWL Table
- Blank out the SWL Table **If Scheduling Wait Lists were used last year, do you want to keep that Wait List data for next year?**
- Copy current Scheduling Wait List (AWL) to SWL

Select which terms to copy:

- Year Long Classes
- Fall
 - Quarter/Trimester 1
 - Quarter/Trimester 2
- Spring
 - Quarter/Trimester 3
 - Quarter/Trimester 4

When copying MST to SMS, usually you will want to copy the sections in all terms.

One option for creating a Scheduling Master Schedule:
Step 1: Blank out the SMS table and press Initialize Scheduling. Wait for email confirmation. Refresh the page.
Step 2: Copy current master schedule (MST) table to the new SMS table. Press Initialize Scheduling again. Wait for email confirmation.
Step 3: Adjust SMS as necessary for next year.
Note that when the MST is copied to the SMS, Flex Periods (FTF) will be copied from this year to next year.

Flex Scheduling Using Next Year's Grade Levels!

Initialize Scheduling

Initialize Scheduling button will be grayed out if Aeries does not need to run a process (for example, if Scheduling Option is checked or unchecked). The button will be "live" and will need to be pressed if Aeries needs to run a process (for example, blanking out or copying a table).

Course information impacts many areas: Scheduling, Grade Reporting/Standards Based Grade Reporting, Transcripts/Graduation Status, Career Pathways, State Reporting, Academic Plan.

The Courses table (CRS) is used by all schools in your district, so make sure everyone agrees with changes before changes are made. In other words, permissions to the CRS table should be assigned conservatively.

When to make changes?

- If Courses are used in current year, make changes AFTER the New Year Rollover and before the new school year starts
- New Courses for next year can be added now

Courses can be inactivated for this year (**Status**) or next year (**Next Yr Status**).

Data in these fields populate newly created sections in the SMS or MST:

- **Default Credit** (CRS.CR)
- **Low Grd/High Grd** (CRS.LO/CRS.HI)

These fields will display on **Course Requests Entry** on the Student./Parent Portal:

- **N/H** (CRS.NH): Academic/non-Academic/Honors
- **Course Description**: add Course Catalog data
- Courses are grouped by **Subject Area** on the Portal

Prerequisite Crs (CRS.PR): Does not check credits/grades, etc.

- Sets two Courses to not schedule into the same term
- For example, if Course 100 is a prerequisite of Course 101, a student who requests both Course 100 and Course 101 is scheduled into Course 100 in the Fall and Course 101 in the Spring.
- If not used correctly, this field may cause scheduling errors

Course Data													
CrsID#	Title	Long Title	N/H	Coll Prep	AcaWt	Low Grd	High Grd	Default Credit	Max Credit	Status			
0010	PE 9		N		0	9	9	5.00	10.00	- Active			
	Subject Area Codes	Dept	Term	Content Group	NCES Code	CIP Code	Next Course	Trm Seq	Yr Seq	Exc	PE	T/A	Next Yr Status
B		P	Y					0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		- Active
User1	User2	User3	User4	User5	User6	User7	User8						
P													
Course Description						Course Notes							
Will be displayed on the Student/Parent Portal Course Requests Entry page, for this Course. Consider adding Course Catalog description or guidance for why/why not to choose this Course.													
<input type="button" value="Add"/> <input type="button" value="Copy"/> <input type="button" value="Change"/> <input type="button" value="References"/>													

Alternate Crs		Prerequisite Crs		Content Standard Area		Trad Gender		Vo	
Board Adoption				Last Revision Date			Revision Type		
Seats	Meets Alg I Reqmnt	Alg I Crd Required		Hrs for Completion		Cc			
50	<input type="checkbox"/>	0.00		0.00					

Methods for Gathering Course Requests

- Import from Academic Plan
- Mass Change or Add Course Requests page
- Course Requests page
- Student/Parent Portal

 Scheduling Using Next Year's Grade Levels!

Course Request

Counselor	Time Range	Schedule Group	Display Options	★ Old Edit View
723	Robles	No Group Change	<input type="checkbox"/> Show Available Periods	

[Edit](#)

Crs ID	Course Title	Prf	Teacher Name	Meets	AltCrs	Sec#	Per	Trm
0019	Adv Dance	0			0 Manage	0		
0862	ROP Ath Train	0			0 Manage	0		
0918	Reading Fund	0			0 Manage	0		
0919	English 11	0			0 Manage	0		
0925	Algebra B	0			0 Manage	0		
0956	US History	0			0 Manage	0		

[View SMS](#) [Course Request Packet](#) [Course Request Section Packet](#) [Print Scheduling Class Schedule](#) [Print Course Requests](#) Schedule Alternates

- Course Request Packets can be created for any set of courses commonly requested by students
- Examples at a high school:
 - 9th Grd Honors
 - 10th Grd Regular w/Geometry
 - 11th Grd College Prep
- Once a packet is created, it can be assigned to a student using:
 - **Course Requests** page
 - **Mass Change or Add Crs Requests** page
 - **Classes** page (current year scheduling)
- Duplicate Course IDs can be added to a packet; for example, if Fall and Spring sections will be created for the same Course

Course Request Packets

Code	Description	LO	HI
10H	10th Grd Honors	10	10
10R	10th Grd Reg w/ Geom	10	10
10R.1	10th Grd Reg w/ Adv Alg	10	10
11H	11th Grd Honors	11	11
11R	11th Grd Reg w/ Span	11	11
11R.1	11th Grd Reg w/ Fren	11	11
12ES	12th Regular English and Social Studies	12	12
12R	12th Grd Reg	12	12
9H	9th Grd Honors	9	9
9R	9th Grd Reg w/ Alg A Span	9	9
9R.1	9th Grd Reg w/ Alg 1 Span	9	9
9R.2	9th Grd Reg w/ Alg A Fren	9	9
9S	9th Grd SDC	9	9
ISPH	Ind Study Placeholders	9	12

Records			
Course ID	Course Title	Grade - Range	
0011	PE	9 - 12	
0315	Hon Eng 10 CP	10 - 12	
0639	Hon Adv Alg	8 - 12	
0675	IB HL I Biology	11 - 12	
0677	HonChem Pre IB	9 - 10	

Sort Options

Code
 Description
 Grade Levels

Name the packet and add Grade Range

Course Request Packets

Add Packet

Packet Code	Description	Grade Range	
NwPckt	My New Packet Description	9	10

Sort Options

Code
 Description
 Grade Levels

Search for Courses and add them

Records

Course ID	Course Title	Grade - Range
0010	PE 9	9 - 9

Course Request Section Packets

- For existing MST or SMS sections, Course Request Section Packets can be created for any set of sections that “go together”
- Examples:
 - Section “spokes” of a wheel
 - Econ/Govt section “pairs”
- Once a packet is created, it can be assigned to a student using:
 - **Course Requests** page (SMS sections)
 - **Classes** (MST sections)

A screenshot of a software interface. At the top, there is a button labeled "Add Packet" with a red border. Below it is a blue bar with the text "Sort Options". Underneath the blue bar are three radio buttons: "Code" (which is selected), "Description", and "Grade Levels".

A screenshot of a form titled "Course Request Section Packets". At the top, there is a button labeled "Add Packet". Below it is a table with three columns: "Packet Code", "Description", and "Grade Range". The "Packet Code" field contains "SecPkt", the "Description" field contains "Description of this Packet", and the "Grade Range" field contains "9" and "10" with dropdown arrows. Below the table, there is a red instruction: "Add code and description and Grade Range for the packet". At the bottom, there are two buttons: "Save" (with a red border) and "Cancel".

A screenshot of a software interface showing a "Records" section. At the top, there are two tabs: "MST Sections" (highlighted in yellow) and "SMS Sections" (highlighted in green). Below the tabs is a table with columns: "Section", "Course ID", "Course Title", and "Grade - Range". There is a search bar with the text "Pick a Section" and a red instruction: "Search for sections and add them to the packet". Below the search bar is a dropdown menu with the text "Pick a Section". The table contains the following data:

Section No	Course	Teacher
43	0304-English 12 CP	Turner (816)
44	0662-Lab Asst Sci	Manning (672)
45	0010-PE 9	Sanders (702)

Import Course Requests from the Academic Plan

- Can import for specific Terms/Grade Levels.
- **Include Inactive Students** (not needed to include pre-enrolled).
- **Select Location(s) to Import:** schools other than the Home school where the student has chosen to take a Course. If other schools are included, they are imported along with the student's home school requests. If there are no Course Requests from other Locations, leave blank.
- **Limit by Student Group with Query** opens a Query window where a KEEP statement can be used.
- **Delete Existing Course Requests?** allows the process to be run again with updated Requests without creating duplicates.
- **Preview Only** button will let you know how many records, the student names, and the Course Requests, so you can review before importing.
- **Update SSS** button will create the Course Requests.
- An 'Updating...!' message will be displayed while the process is running. When the process is completed, the User will receive an email notification indicating the number of records updated. You do not need to stay on this page while the process is running.

Stu#	Last ...	First ...	NG	Gen...	Tg	Term	Cours...
2	Abdelno	Alice	10	F			0417
2	Abdelno...	Alice	10	F			0608
2	Abdelno...	Alice	10	F			0656
2	Abdelno...	Alice	10	F			0674
2	Abdelno...	Alice	10	F			0701
2	Abdelno...	Alice	10	F		1	0765
2	Abdelno...	Alice	10	F		3	0017
3	Abdo	Alice	10	F			0101
3	Abdo	Alice	10	F			0315
3	Abdo	Alice	10	F			0401
3	Abdo	Alice	10	F			0608
3	Abdo	Alice	10	F			0656
3	Abdo	Alice	10	F			0674
3	Abdo	Alice	10	F			0701
3	Abdo	Alice	10	F		1	0765
3	Abdo	Alice	10	F			1251

Mass Change or Add Course Requests

The **Mass Change or Add Crs Requests** page can be used to add, modify, change or delete students' Course Requests. Multiple Courses can be added, dropped, or changed for all students, for students by Grade Level, or for KEEP/SKIP groups of students.

PermLked Course Requests will not be updated during the Mass Change process.

Mass Change or Add Crs Requests
☆

Mass Change or Add Course Requests

Change students with these course requests...

Course # to Search

Leave blank to Add courses only

Only change students in the following grades:

PS	TK	K	1
2	3	4	5
6	7	8	9 <input checked="" type="checkbox"/>
10	11	12	14
15	16	17	18

To now have these course requests...

pe 9

CN	Description
0010	PE 9
808	PE 9
813	PE 9

Leave blank to Drop courses only

Only change for gender...

Gender Selection

- Female
- Male
- Nonbinary

Include Inactive Students:

⚠ Students are being Scheduled Using Next Year's Grade Levels!

Students to be Updated

Student ID	Last Name	First Name	Next Grd	Gender
99400010	Abo	Kyle	9	M
99400013	Abrego	Ivette	9	F
99400019	Acosta	Donovon	9	M
99400029	Aguila	Errol	9	M
99400031	Aguilar	Joshua	9	M
99400039	Akins	Isaiah	9	M
99400041	Albert	Alison	9	F
99400044	Alegria	Reece	9	M
99400047	Alexander	Christina	9	F
99400049	Alfaro	Kathryn	9	F
99400054	Almodovar	Armando	9	M
99400059	Alvarado	Nicholas	9	M
99400064	Amador	Isaac	9	M
99400067	Amezcuca	Christopher	9	M
99400070	Anand	Breeann	9	F
99400073	Ancheta	Stephen	9	M
99400081	Apodaca	Adrian	9	M
99400088	Arat	Antonio	9	M
99400101	Arellano	Raul	9	M
99400105	Arevalo	Santiago	9	M
99400112	Arizmendi	Israel	9	M
99400117	Armstrong	Melissa	9	F
99400118	Aronchick	Marisa	9	F
99400120	Arredondo	Christopher	9	M

Alert

497 students WOULD BE updated.

Mass Change or Add Course Requests

Add Course Requests:

1. Enter the Course number(s) to be added on the right side of the form.
2. Leave the left side of the form blank.
3. Click the **Preview Only** button. A list of students displays.
4. Verify the list of students. If correct, click the **Update** button.

Mass Change or Add Crs Requests

Change students with these course requests...
 Course # to Search:

To now have these course requests...
 Course # to Search:
 Courses: 0302 - English 10 CP

Student ID	Last Name	First Name	Next Grd	Gender
99400002	Abdelnour	Alice	10	F
99400003	Abdo	Alice	10	F
99400004	Abdo	Arnold	11	M
99400006	Abejon	Tanya	11	F
99400008	Abesamis	Tahiana	10	F
99400010	Abo	Kyle	9	M
99400012	Abrego	Alice	10	F
99400013	Abrego	Ivette	9	F
99400016	Acharya	Josiah	12	M
99400017	Ackermann	Kathrin	11	F
99400018	Acosta	Annessa	10	F
99400019	Acosta	Donovan	9	M
99400020	Acuna	Allan	11	M
99400021	Acuna	Darlene	11	F
99400023	Adame	Nambia	12	F
99400024	Adragna	Stefania	11	F
99400027	Aguayo	Taunie	11	F
99400028	Aguilar	Jennifer	11	F
99400029	Aguilar	Errol	9	M
99400030	Aguilar	Allan	10	M
99400031	Aguilar	Joshua	9	M
99400032	Aguilar-Lopez	Kristi	12	F
99400033	Aguirre	Raelena	12	F

Alert: 1977 students WOULD BE updated.

Students are being Scheduled Using Next Year's Grade Levels!

Buttons: All/None, **Preview Only**, Update, Print List, Reset

Drop Course Requests:

1. Enter the Course number(s) to be dropped on the left side of the form.
2. Leave the right side of the form blank.
3. Click the **Preview Only** button. A list of students displays.
4. Verify the list of students. If correct, click the **Update** button.

Mass Change or Add Crs Requests

Change students with these course requests...
 Course # to Search:

To now have these course requests...
 Course # to Search:

Student ID	Last Name	First Name	Next Grd	Gender
99400030	Aguilar	Allan	10	M
99400045	Alejandro	Arturo	10	M
99400053	Almada	Jesus Jesse	10	M
99400082	Apodaca	Joshua	10	M
99400098	Ardon	Daniel	10	M
99400107	Arias	Amir	10	M
99400111	Arias	Timothy	10	M
99400116	Armitage	Shane	10	M
99400128	Artechi	Chima	10	M
99400177	Bang	Allan	10	M
99400199	Barrett	Jason	10	M
99400204	Bartlett	Alejandro	10	M
99400206	Bauer	Richard	10	M
99400208	Bawany	Nicholas	10	M
99400242	Berdin	Timothy	10	M
99400258	Bivens	Adam	10	M
99400260	Black-Lewis	Javier	10	M
99400274	Bolik	Shane	10	M
99400328	Buchanan	Adam	10	M
99400350	Byers	Luke	10	M
99400358	Coceres	Jonathan	10	M
99400369	Call	Pierre	10	M
99400398	Carosa	Zachary	10	M

Alert: 1977 students WOULD BE updated.

Students are being Scheduled Using Next Year's Grade Levels!

Buttons: All/None, **Preview Only**, Update, Print List, Reset

Mass Change or Add Course Requests

Change an existing Course Request:

1. Add the existing Course number to the left side of the form.
2. Add the new Course number to the right side of the form.
3. Click the **Preview Only** button.
4. A list of students will display on the right, under **Students to be Updated**.
5. An **Alert** popup provides the total number of students who would be updated if the change is made.
6. Verify the list of students. If correct, click the **Update** button to complete the mass change.

Mass Change or Add Course Requests

Using Course Request Packets:

Course Requests can also be added, changed, or dropped using Course Request Packets.

To add a Course Request Packet:

1. Select the students' Grade Level(s) to add the Packet to.
2. Leave the left side of the form blank.
3. Press the **CrsReqPackets** button on the right to display all packets.
4. Select the packet to add. The Courses contained within the packet display on the right side of the form. Press **OK** to continue.
5. A confirmation message displays. Press **OK** to continue.
6. The Courses from the selected packet will be listed.
7. Click the **Preview Only** button at the bottom of the form. A list of students will be displayed on the right. An **Alert** displays telling you how many students would be updated if you click the Update button.
8. If the number and names of students seem correct, press the **Update** button at the bottom of the form.

Packet	Description	LO	HI	Course Info
10H	10th Grd Honors	10	10	
10R	10th Grd Reg w/ Geom	10	10	
10R.1	10th Grd Reg w/ Adv Alg	10	10	
11H	11th Grd Honors	11	11	
11D	11th Grd Reg w/ Span	11	11	

Course #	Course Title	NA	CP	Low	High	Trm	TG	T/A
0656	Biology		P	9	12	Y		No
0302	English 10 CP		P	9	12	Y		No
0608	Geometry Cp		P	9	12	Y		No
0011	PE	N		9	12	Y		No
0417	Spanish II		P	9	12	Y		No
0701	World Hist. Cp		P	9	12	Y		No

The **Course Requests/Schedule** page is used to add or change Course Requests and/or to schedule an individual student into sections.

New Edit View supports:

- Class Links
- Replacing an Existing Course Number
- Functionality similar to **Classes** page (editing all Course Requests at once, then saving)

⚠ Scheduling Using Next Year's Grade Levels!

Course Request
Term View
Term and Day of Week View

★ Old Edit View

Term	Total Courses	Total Credits
Y	7	35.00

Counselor	Period	Range	Schedule Group	
623	Monarch	0	9	No Group Change

Edit

Crs ID	Course Title	0	1	2	3	4	5	6	7	8	9	Prf	Teacher Name	Meets	AltCrs	Sec#	Per	Trm	More Class Info	Reject	PermLK	All
0417	Spanish II	✓		○		○	○					0	Villalobos	MTWTF	3	2689	0	Y				○
0701	World Hist. Cp		✓	○	○	○	○	○				0	Smith, E.	MTWTF	0	2094	1	Y				○
0315	Hon Eng 10 CP		○	✓	○	○	○					0	Simmons	MTWTF	0	1281	2	Y				○
0608	Geometry Cp		✗	✗	✓	✗	✗	○				0	Clark	MTWTF	0	3002	3	Y				○
0970	Leadership					✓						0	Wallace	MTWTF	3	460	4	Y				○
0656	Biology		✗	✗	✗	✗	✓	✗				0	Mitchell	MTWTF	0	1285	5	Y				○
0045	Volleyball							✓				0	Ath Dir W VB	MTWTF	0	2648	6	Y				○

View SMS
Course Request Packet
Course Request Section Packet
Print Scheduling Class Schedule
Print Course Requests
 Schedule Alternates
Reschedule

Previous Rejected Student
Next Rejected Student

Course Requests/Schedule

In **New Edit View**: Press the **Edit** button to move into Edit Mode:

The **Add New Record** button will add one new Course Request:

1. Use the **Crs ID** field to search for a Course name or Course number.
2. Select the appropriate Course from the drop-down.
3. If you know the specific section number, it can be added.
4. Press **Save** to save all changes.

The **Add Many Records** button will add multiple Course Requests:

1. Ten empty records will be displayed. Search using the **Crs ID** field by entering a Course number or the name of a Course.
2. Specific section numbers can be added for any Course Request.
3. Press **Save** to save all changes.

The **View SMS** popup can be used to add Course Requests based on SMS sections:

1. Press **View SMS**.
2. A popup window will display selected data for each section in the Scheduling Master Schedule.
3. Use the Filters in the top header to limit the displayed sections.
4. Press the green + icon to add the Course Request and section to the student's schedule.

Delete a Course Request:

1. Press the trash can icon to the left of the Course Request.
2. On the confirmation popup, confirm deletion.
3. Press **Save** to save all changes.

Save	Reset	Cancel	+ Add New Record	+ Add Many New Records	View SMS	+ Ad												
Delete	Crs ID	Course Title	0	1	2	3	4	5	6	7	8	9	Prf	Teacher Name	Meets	Sec#	Per	Trm
	0417	Spanish II											0	Villalobos	MTWTF	2689	0	Y
	0701	World Hist. Cp											0	Smith, E.	MTWTF	2094	1	Y
	0315	Hon Eng 10 CP											0	Simmons	MTWTF	1281	2	Y
	0608	Geometry Cp											0	Clark	MTWTF	3002	3	Y
	0970	Leadership											0	Wallace	MTWTF	460	4	Y
	0656	Biology											0	Mitchell	MTWTF	1285	5	Y
	0045	Volleyball											0	Ath Dir W VB	MTWTF	2648	6	Y

Add an Alternate Course Request on Course Requests/Schedule

Alternate Course Requests allows an alternate course to be selected, when the primary course request is unavailable.

If an Alternate Course Request is added, it must also be linked (associated with) a primary Course Request.

To add Alternate Course Requests:

1. Press **Add New Record** button in the Alternate Course Requests section, under the grid of a student's Course Requests.
2. Enter the Course Number for the Alternate Course Request. Press the magnifying glass button to search for a Course by Course Name or Course Number, if necessary.
3. Select the desired course to set the Course Number.
4. Press the save button.

The screenshot displays the 'Alternate Course Requests' interface. At the top, there is a header 'Alternate Course Requests' with a 'Priority Sort' button. Below this is a table with columns 'Course' and 'Date Added'. The table contains three rows: 'Art I (0101)', 'Ceramics I (0104)', and 'Beg Dance (0017)', all with a date of '2/7/2023 12:00:00 AM'. Below the table, there are icons for delete, refresh, and a search input field containing '0102'. A modal window is open, showing a search bar and a table of search results. The 'Add New Record' button is highlighted with a red box. The search results table has columns for course number, name, and credit hours. The row for '0102 Arts Crafts I' with 5.00 credit hours is highlighted with a red box.

Course	Date Added
Art I (0101)	2/7/2023 12:00:00 AM
Ceramics I (0104)	2/7/2023 12:00:00 AM
Beg Dance (0017)	2/7/2023 12:00:00 AM

Course Number	Course Name	Section	Credits
0101	Art I	9-12	5.00
0102	Arts Crafts I	9-12	5.00
0104	Ceramics I	9-12	5.00
0105	Ceramics II	9-12	5.00

Linking Alternate Course Requests to Primary Course Requests on Course Requests/Schedule

The **Manage** button is used to associate or "link" one or more Alternate Course Requests to a primary Course Request.

Each Alternate Course Request must be associated to at least one primary Course Request; this is how the Scheduler knows which Alternate Course Requests to choose, based on the primary Course Request which did not successfully schedule.

Next to the **Manage** button, the number of Alternate Course Requests assigned to a primary Course Request is displayed.

There is no limit to the number of Alternate Course Requests that can be linked to primary Course Requests.

Alternate Course Requests can be linked to multiple primary Course Requests.

To link an Alternate Course Request:

1. Press the **Manage** button next to the appropriate Course Request.
2. The Manage Alternate Request Association popup window will be displayed for the selected Course Request.

All Alternate Course Requests recorded for the student will be displayed in a single list in their priority order, which can be modified.

Select the check mark to the left of any Alternate Course Request that will be linked to the selected Course Request.

3. Click the **Save** button.

Crs ID	Course Title	0	1	2	3	4	5	6	7	8	9	Prf	Teacher Name	Meets	AltCr	AltCr
0848	ROP E-Commerce											000			0	Manage
0702	US History Cp	✓										000	Lehigh	MTWTF	0	Manage
0637	Algebraic Apps		✓									000	Sneed	MTWTF	0	Manage
0326	Sh Eng Lit II			✓								000	Edwards	MTWTF	0	Manage
0303	English 11 CP				✓							000	Raus	MTWTF	0	Manage
0104	Ceramics I					✓						000	Sherman	MTWTF	0	Manage
0012	Weight Trng						✓					000	Wallace, S	MTWTF	0	Manage
0765	Health/Careers								✓			000	Wilber	MTWTF	0	Manage

Manage Alternate Request Association
Primary Course Request: Ceramics I (0104)

Associate?	Course	Date Added
<input checked="" type="checkbox"/>	ROP CulinaryArt (0810)	4/22/2020 6:28:11 PM
<input checked="" type="checkbox"/>	Arts Crafts I (0102)	4/22/2020 6:28:26 PM
<input type="checkbox"/>	ROP Health Car (0817)	4/22/2020 6:29:02 PM
<input type="checkbox"/>	No Zero Period (0001)	4/22/2020 6:26:49 PM

Setting Alternate Course Requests Priority on Course Requests/Schedule

If multiple Alternate Course Requests exist, they should be prioritized. The scheduling process will always try the primary Course Request first. If rejected, it will try the first associated Alternate Course Request, then the second, and proceed down the list of associated Alternate Course Requests.

To set priority, Alternate Course Requests need to be sorted:

- Press **Priority Sort**.
- A move button with a vertical arrow will display to the left of the delete button.
- Drag and drop any Alternate Course Request that needs to be adjusted.
- When finished moving Alternate Course Requests, press **Done**.

The priority sort order is stored in the ACR.SRT field.

Alternate Course Requests		Priority Sort	Done
	Course	Date Added	
	 Art I (0101)	2/7/2023 12:00:00 AM	
	 Ceramics I (0104)	2/7/2023 12:00:00 AM	
	 Beg Dance (0017)	2/7/2023 12:00:00 AM	

Scheduling Exclusions on Course Requests/Schedule

Teacher, Student, and Period exclusions may be specified.

When the student is scheduled, the Scheduler will not put the student into sections with the specified teachers or students or into sections during the specified periods.

If an exclusion prevents the student from being scheduled into any sections, the affected Course Request will be assigned an appropriate reject reason.

When a student exclusion is added, records are automatically added to both students, so that they are both excluded from each other. When an exclusion is deleted from one student, it is automatically deleted from both.

Scheduling Exclusions are recorded in the SED table.

How to add an exclusion:

1. Press the **Add New Scheduling Exclusion** button.
2. Select the **Type** of Scheduling Exclusion.
3. Once the **Type** has been specified, enter the period, teacher name, or student name. Search for the appropriate teacher or student, if necessary.
4. Press the save icon to save the exclusion.
5. Press the delete icon to delete an exclusion.

Scheduling Exclusions

	School	Type	Exclusion
	994	Period	7
	994	Student	99402455 - Staggs, Nicholas Andrew
	994	Teacher	610 - Alvarado

+ Add New Scheduling Exclusion

Student #	Student Name
99400001	Abbott, Allan James

Update Course Request Options

What Courses should parents/students be able to choose from, when they are choosing Course Requests on the Student/Parent Portal? Create that list here and it will be saved in the Course Request Option (CRQ) table.

The CRQ list must be managed separately for each Grade Level.

Initialize New Course Request Option Table button: if CRQ is blank. The list are on the left will be blank and read **No data is found for these options.**

Recreate Course Request Option Table button: if CRQ was created before. The list on the left will contain Courses and checkboxes.

Checked Courses will be available on the Student/Parent Portal for selection during Course Requests Entry.

The screenshot shows the 'Update Course Request Options' interface. The main area is empty with the message 'No data is found for these options.' The right-hand 'Options' panel shows 'Grade Level Shown: 9' and 'Total Courses Tagged: 0'. A red warning banner reads 'Scheduling Using Next Year's Grade Levels!'. The 'Initialize New Course Request Options Table' button is highlighted with a yellow box. Other buttons include 'Un-Tag All', 'Tag All', 'Add a Course', 'Update Totals from MST', and 'Tag and Un-Tag Based on Totals'.

The screenshot shows the 'Update Course Request Options' interface with a list of courses. The right-hand 'Options' panel shows 'Grade Level Shown: 9' and 'Total Courses Tagged: 59'. A red warning banner reads 'Scheduling Using Next Year's Grade Levels!'. The 'Recreate Course Request Options Table' button is highlighted with a red box. Other buttons include 'Un-Tag All', 'Tag All', 'Add a Course', 'Update Totals from MST', and 'Tag and Un-Tag Based on Totals'.

Course ID	Grade	Course Name	Count
<input checked="" type="checkbox"/>	F	ROP Sm Pts Assb (0856)	12
<input checked="" type="checkbox"/>	F	ROP Int Tech/Mk (0857)	1
<input checked="" type="checkbox"/>	F	ROP Comp Anim (0880)	58
<input checked="" type="checkbox"/>	A	English 9 (0897)	16
<input checked="" type="checkbox"/>	J	Resource (0912)	54
<input checked="" type="checkbox"/>	J	StudySkills/Trans (0917)	4
<input checked="" type="checkbox"/>	J	Reading Fund (0918)	29
<input checked="" type="checkbox"/>	D	Algebra A (0924)	8
<input checked="" type="checkbox"/>	D	Pre-Algebra (0928)	22
<input checked="" type="checkbox"/>	A	English 9 (0946)	12
<input checked="" type="checkbox"/>	H	Physical Scienc (0954)	12
<input checked="" type="checkbox"/>	I	Leadership (0968)	12

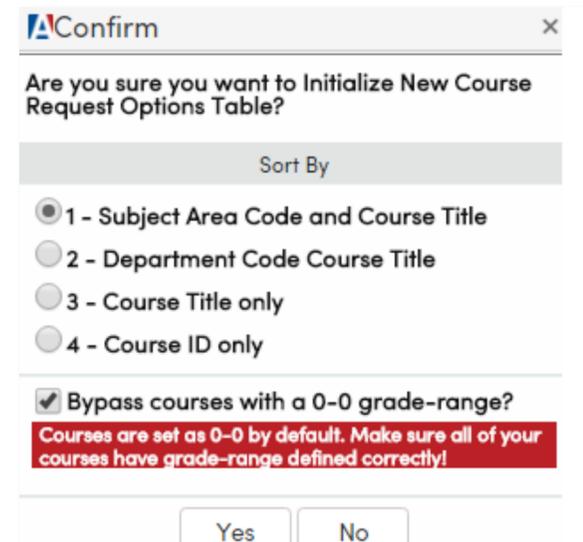
Initialize a New Course Requests Options Table on Update Course Request Options

1. Press **Initialize New Course Request Options** button.
2. A Confirm form popup will display.
3. Select how the Courses should be sorted. Course ID and Course Title will display regardless of the option selected.
4. If desired, check box to **Bypass courses with a 0-0 grade range** (note: 0-0 is Kindergarten).
5. Click the **Yes** button when finished.

The list will now display all Courses available for the lowest grade level from your school's grade range. All Courses are initially checked to **Allow** (so they will be available on the Portal for that grade level). In the example at right, the grade level is 9 and 339 is the number of courses made available.

All courses with a check mark in the Allow column will be available for parents and students to select. If a Course is not checked: will not be available for that grade level.

Courses can be manually selected for inclusion by checking or un-checking the **Allow** checkbox. Courses can also be added or removed using one of the methods described on the next slides.



Confirm

Are you sure you want to Initialize New Course Request Options Table?

Sort By

- 1 - Subject Area Code and Course Title
- 2 - Department Code Course Title
- 3 - Course Title only
- 4 - Course ID only

Bypass courses with a 0-0 grade-range?
Courses are set as 0-0 by default. Make sure all of your courses have grade-range defined correctly!

Yes No

The table will now display with all courses available for the lowest grade level from your school's grade range. All courses are initially checked to **Allow**. In the example below the grade level is 9 and 339 is the number of courses available for that grade level.

Select Courses that students will be able to select from in the Portal.

Allow	Sort Code	Course ID	Course Title	Actual MST Total	Options
<input checked="" type="checkbox"/>		0993	Admin F Dance (0993)	0	<p>Grade Level Shown: 9 ▼</p> <p>Total Courses Tagged: 359</p> <p><input type="checkbox"/> Hide Un-Tagged Courses</p> <p>Scheduling Using Next Year's Grade Levels!</p> <p>Recreate Course Request Options Table</p> <p>Un-Tag All Tag All</p> <p>Add a Course</p> <p>Update Totals from MST</p> <p>Tag and Un-Tag Based on Totals</p>
<input checked="" type="checkbox"/>		0989	Admin F Drama (0989)	0	
<input checked="" type="checkbox"/>		0994	Admin F Fam Lvg (0994)	0	
<input checked="" type="checkbox"/>		0992	Admin F Peer Tc (0992)	0	
<input checked="" type="checkbox"/>		AEDP0	Alt Ed Period 0 (AEDP0)	0	
<input checked="" type="checkbox"/>		AEDP1	Alt Ed Period 1 (AEDP1)	0	
<input checked="" type="checkbox"/>		AEDP2	Alt Ed Period 2 (AEDP2)	0	
<input checked="" type="checkbox"/>		AEDP3	Alt Ed Period 3 (AEDP3)	0	
<input checked="" type="checkbox"/>		AEDP4	Alt Ed Period 4 (AEDP4)	0	
<input checked="" type="checkbox"/>		AEDP5	Alt Ed Period 5 (AEDP5)	0	
<input checked="" type="checkbox"/>		AEDP6	Alt Ed Period 6 (AEDP6)	0	

Use Update Totals from MST on Update Course Request Options

Quickly create the CRQ table based on whether students took the Course **this** year (current MST totals).

1. Press **Initialize** or **Recreate Course Request Options Table**.
2. Choose a **Grade Level Shown**.
3. Press **Update Totals from MST**.
4. Press **Tag and Un-Tag Based on Totals**.
5. Repeat for each **Grade Level Shown**.
6. Check **Hide Un-Tagged Courses**.
7. The **Add a Course** button can always be used to add another Course (a new one or one that no students took this year).

There is no Save button; it saves as you go.

If sections exist in the MST with grade ranges that are different from the Course's grade range, a table will be displayed with their information. Those sections' totals will not be included in the **Actual MST Total** column.

***** MST sections with grade ranges different from the CRS date range are listed below. To insure accuracy of MST Totals, these courses are not displayed for this grade level.

SE	Crs Id	Course Name	CRS.LO	CRS.HI	MST.LO	MST.HI
3120	0224	WebDesign I	10	12	9	12
2107	0326	Sh Eng Lit II	10	12	9	12
1093	0426	IB Span HL 1	11	12	9	12
1123	0637	Algebraic Apps	11	12	10	12
2036	0637	Algebraic Apps	11	12	10	12

Student or Parent Portal: Primary and/or Alternate Course Requests Entry

On the Student or Parent Portal: Classes > Course Requests Entry.

The Course Requests Entry page is also available from the Course Requests page **Add from Course Requests Table** button.

The Course Requests Entry page will allow entry of Primary and Alternate Course Requests. On the right, the courses within the Course Request (CRQ) table (by grade level) can be displayed using the filter.

The CRQ table must be populated and set up for parents and students to view the courses here; see the Update Course Request Options documentation for more information.

The student's existing Course Requests, if any, will display on the left side in the Course Requests area of the page, ordered by Subject Area.

Security: Portal Groups need permissions to SSS table for Course Requests Entry.

The Portal Options Scheduling tab includes options and date range windows for Course Requests Entry.

The screenshot displays the 'Course Requests' interface for user 'Kristy Milchovich'. At the top, there are navigation tabs: 'General', 'Contact', 'Add'l Info', 'Programs 0', and 'User Codes'. A yellow banner states: 'All Course Requests must be approved by appropriate school personnel.' A blue box indicates 'Scheduling for grade: 10'. Below this is a 'Filter Courses' section with a search bar containing 'pe' and a dropdown menu set to 'Show All Courses'. A table of 'Primary Course Requests' is shown with columns for 'Subject Area' and 'Alternate Requests'. The 'Physical Education' row is highlighted, showing 'PE (0011)' with a '1' in a blue circle and a 'Manage' button. To the right, a 'Click A Course To Request or ? for Info' section shows a list of courses, with 'PE (0011)' selected. A red box highlights the 'PE (0011)' course in this list. A red arrow points from this box to the 'Request Primary' and 'Request Alternate' buttons in the course details panel. The details panel shows: 'Subject Area #1: Physical Education', 'Subject Area #2: Computer Science', 'Type: Non Academic Course', 'UC Area: None', and 'CSU Area: None'. A note states: 'Will be displayed on the Student/Parent Portal Course Requests Entry page, for this Course. Consider adding Course Catalog description or guidance for why/why not to choose this Course.' The 'Request Primary' and 'Request Alternate' buttons are highlighted with a red box.

Student or Parent Portal: Primary and/or Alternate Course Requests Entry

Filter Courses: find a specific Course Name or Course Number or a specific Subject Area. Enter the name, partial name or course number into the **Name or Nbr** field or select a Subject Area from the dropdown. Press the Enter key or click the **Search** button to search.

In the example, the filter is set to **Sbj Area:** English.

To request a course, locate the Course from the Filter Courses menu and click on the Course. If more information is about the Course is needed, click the Information icon to the left of the Course.

A pop-up will display allowing you to select whether this course will be added as a Primary or Alternate Course Request. In this example, a Primary Course Request is being added. Click on the **Request Primary** button to add a Primary Course Request.

Once a Course has been requested, it will display by Subject Area as a Primary or Alternate Course Request.

Filter Courses

Name or Nbr: Sbj Area: English

Click A Course To Request or for Info

English 10 (0311) English 10 CP (0302) Sh Eng Lit I (0325)

English 10 (0898) Hon Eng 10 CP (0315) Sh Eng Lit II (0326)

English 10 (0947)

English 10 (0311)

Subject Area #1: English

Type: Academic Course

UC Area: English

CSU Area: English

Filter Courses

Name or Nbr: Sbj Area: English

Click A Course To Request or for Info

English 10 (0311) English 10 CP (0302) Sh Eng Lit I (0325)

English 10 (0898) Hon Eng 10 CP (0315) Sh Eng Lit II (0326)

English 10 (0947)

Primary Course Requests

The school allows a maximum of 9 primary course requests

Subject Area	Course
English	English 10 (0311)
Physical Education	Inter Dance (0018)
Social Science	
Mathematics	Algebra Cp (0607)
Visual/Perform Arts	
Career Tech Arts	ROP CulinaryArt (0810)
Science: Life	
Science: Physical	Phys Science,CP (0674)
Health & Career Ed	
Computer Science	
World Language	
Electives	

Student or Parent Portal: Primary and/or Alternate Course Requests Entry

If students/parents cannot access the Course Request Entry page to choose Course Requests, check the following:

- Portal Options > Security tab > Date Ranges for Allowing Student/Parent Updates to Course Requests
 - Portal Options may not be your responsibility; this is an “Aeries Admin” task
- Check Security to ensure Students/Parents Portal Groups have the correct permissions to the SSS table

Attendance Contacts Grades Gradebook PFT **Scheduling** Miscellaneous Parent Data Changing

Course Requests

Allow Parents/Students to edit Alternate Course Reqs

Maximum Number of Primary Course Reqs:

Maximum Number of Alternate Course Reqs:

Note: Permissions To Update Course Requests need to be granted to Stu/Parent portal groups via [Portal Groups](#)

Date Ranges for Allowing...

Grd	Student/Parent Updates to Course Requests		Student/Parent Viewing of Available Periods (BETA)		Student/Parent Selecting Class Periods (Arena Scheduling) (BETA)	
	Start Date	End Date	Start Date	End Date	Start Date	End Date
K	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
8	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
9	09/01/2014	06/15/2099	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10	09/01/2014	06/15/2099	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
11	09/01/2014	06/15/2099	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
12	09/01/2014	06/15/2099	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Key Course Requests Reports

- Students With No Course Requests
- Students with More/Less Than N Course Requests
- Scheduling Reverse Verification Listing
- Scheduling Course Request Listing
- Course Request Tally
- Scheduling Course Request Letter to Parent

Print Students With More or Less Than N Course Requests
Report Options

Report Format: PDF
Report Delivery: None

Use More Than N Course

Less Than Courses

Sort by Counselor
 Sort by Student

Run Report

Report Tag Information
Report Name Value: PrintStudentsWithNCourseRequests
Query Tag Value: R : All Students Included on this Report
Query Value: The Total Number of Course Requests for Each Student.
[Report Tag Help](#)

Screaming Eagle High School 11/4/2022
2022-2023 **STUDENTS WITH LESS THAN 5 COURSE REQUESTS** Page 1

Stu ID	Student Name	Grade	Gender	Course ID	Course Title
99400006	Abejon, Tanya, A	11	Female	1 0101	Art I
			Female	2 1522	Trans Arrow
99400018	Acosta, Annessa, Grace	10	Female	1 1520	Moved New Sch
99400020	Acuna, Allan, A	11	Male	1 1522	Trans Arrow
99400051	Allen, Neal	11	Male	1 1522	Trans Arrow
99400067	Amezcuca, Christopher, C	9	Male	1 1524	Trans Bridges
99400069	Amick, Tatiana, Nicole	10	Female	1 1523	Trans Oak Knoll

Reports tab: Scheduling

View All Reports: Scheduling category

Report History tab will display reports you ran in the past

Print Scheduling Course Request Tally
Report Options

Report Format: PDF
Report Delivery: None

Select Term to Print

Year
 Fall
 Spring
 1st Qtr
 2nd Qtr
 3rd Qtr
 4th Qtr

Sort By

Course ID
 Course Title
 Department Code

Skip inactive students who are not pre-enrolled

Run Report

2022-2023 **Screaming Eagle High School** 11/4/2022
COURSE REQUEST TALLY Page 1

Course Number and Title	Grade:	9	10	11	12	TOTAL
0010 PE 9		481	0	0	0	481
0011 PE		1	140	13	15	169
0012 Weight Trng		0	75	25	35	135
0015 Marching PE		29	26	13	16	84
0017 Beg Dance		34	50	14	5	103
0018 Inter Dance		0	19	29	12	60
0019 Adv Dance		0	3	11	7	21
0020 Pep Units		9	10	8	15	42
0026 Dan Shw/Dis Tec		8	12	8	6	34
0045 Volleyball		0	15	5	4	24
0046 Mns Basketball		0	4	1	0	5
0047 Wm Basketball		0	3	0	0	3
0048 Mns Soccer		0	5	0	0	5
0049 Wms Soccer		0	15	4	6	25
0055 Wms Tennis		0	11	7	3	21
0056 Wrestling		0	16	11	9	36
0062 Cross Country		2	5	12	10	29

Scheduling reports: Scheduling Reverse Verification Listing

- Lists the students who have a Course Request for the Course
- Print for:
 - Advanced courses
 - Courses with grade or credit requirements
 - Courses with teacher approval or tryout or audition requirements
- Give the report to the appropriate personnel (teachers or counselors or administrators) for approval
- If denied, change the Course Request

Flex Soaring Eagle High School							11/1/2022		
2022-2023				Reverse Verification Listing			Page 1		
		0428		Acc Spanish I					
STU ID	Last Name	First Name	Grade	Gndr	STU ID	Last Name	First Name	Grade	Gndr
89401706	Abbott	Drew	9	M	89402343	Harrell	Matias	9	M
89400607	Adkins	Amanda	9	F	89401872	Harrington	Allen	9	M
89401773	Allison	Edward	9	M	89402245	Hess	Valeria	9	F
89402504	Andrews	Kristen	9	F	89400237	Hoffman	Cristian	9	M
89402644	Atkins	Zane	9	M	89401028	Houston	Lincoln	9	M
89400101	Baker	Jamar	9	M	89402353	Huang	Mareli	9	F
89402006	Barr	Cynthia	9	F	89400088	Knight	Sean	9	M
89401777	Barr	Korbin	9	M	89401311	Lambert	Lee	9	M
89400224	Bauer	Lilliana	9	F	89400070	Lyons	Shyla	9	F

After Course Requests are gathered, plan for the SMS using these reports:

Scheduling Course Request Tally report

- Total / Max = Number of Sections Needed
- Look for potential issues (courses not offered; grade levels); then print the Scheduling Reverse Verification Listing to see who requested it
- Large school? Print report to Excel; add a column to do the Total / Max math

⊕ Scheduling Process Dashboard **B. 9.**

2018-2019		Screaming Eagle High School					8/13/2019
		COURSE REQUEST TALLY					Page 1
Course Number and Title	Grade:	9	10	11	12	TOTAL	
0429	Accel Span II	0	87	0	0	87	
0582	Adv Band	0	22	0	0	22	
0332	Adv Drama	0	19	0	0	19	
0712	Ap Eur Hist Cp	0	85	0	0	85	
0101	Art I	0	2	0	0	2	

Scheduling Conflict Matrix report

- Compares Courses and tells you how many students requested both
- Which Courses could have sections in the same period? Or should not be in the same period?
- Run for ALL singletons and doubletons

⊕ Scheduling Process Dashboard **C. 3.**

2019-2020		Screaming Eagle High School										2/10/2020
		Course Conflict Matrix										Page 2
0015	Marching PE											
Crs#	Requests	Crs#	Requests	Crs#	Requests	Crs#	Requests	Crs#	Requests	Crs#	Requests	C
0010	29	0012	2	0015	61	0017	1	0026	23	0095	1	←
0123	1	0224	2	0228	2	0255	7	0301	16	0302	1	
0304	8	0314	12	0315	2	0316	5	0317	7	0327	2	
0335	1	0351	1	0401	3	0403	3	0405	1	0416	4	←
0418	1	0426	3	0427	3	0428	6	0429	1	0582	40	←
0607	10	0608	1	0610	6	0612	8	0618	1	0624	4	
0632	1	0634	2	0637	1	0642	6	0645	10	0647	6	
0659	4	0660	4	0662	1	0666	1	0674	16	0675	1	
0678	4	0697	1	0698	4	0700	5	0701	1	0702	10	
0704	11	0708	2	0712	1	0714	11	0725	5	0726	4	
0775	4	0810	3	0859	5	0872						
0924	1	0946	1	0957	1	0961						

One student has a request for both course 0095 and course 0015

40 students have a request for both course 0582 and course 0015

Are the two courses singletons? Doubletons?

The Tally + The Matrix + Your Time = the Scheduling Master Schedule

Identify school-specific factors that will impact building your Scheduling Master Schedule:

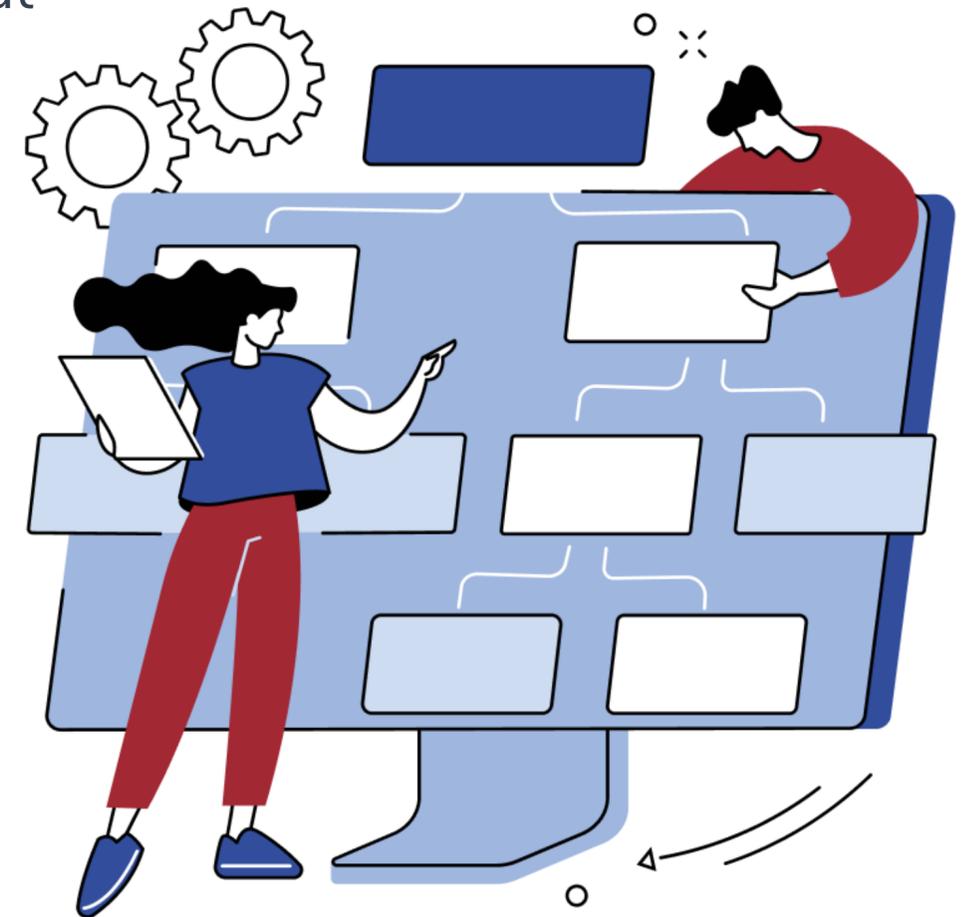
- Teacher turnover (can create placeholders if necessary, if a new teacher has not been identified/hired)
- Teachers on campus only certain periods/part-time
- Teacher contracts
- Common prep periods for groups of teachers (departments? Co-teachers?)
- Room availability and capacity (desks? space?)
- Sections required to be in specific period/term (ex: 6th grade PE in 7th period)
- Repeating teacher year after year (ex: math teacher teaching all levels of math)
- Linked courses split by lunch/break
- Avoiding future schedule disruptions by placing section(s) of certain Courses into specific periods with other section(s) of specific Courses (Academic Workshop; advanced math, etc.)
- Can teacher teach two sections during same period? For example, Art II with fifteen students and Art III with ten students, at the same time and with the same teacher

Make a list of “have to haves” and “want to haves” and “nice to haves,” but don’t let “nice to haves” turn into “have to haves” !!!!

Order of creating/placing sections:

1. Place all sections that are required to be in a particular period.
2. Place singleton sections in period with least conflicts.
 - Start with the singleton with the most requests, then next most, etc.
 - A singleton is when a course is offered once.
3. Place doubletons in same way. A doubleton is when a course is offered twice.
4. Place tripletons in same way. A tripleton is when a course is offered three times.
5. Start checking seat counts.* Place sections in periods where more seats for that Grade Level are needed.
 - Try to balance known small classes with known large classes.
6. Continue adding sections based on the number of sections per course. Check the seat counts after each addition.

* Seats counts are provided by this report:
Scheduling Class Load Averages report – Display Only Totals option



Three options for how to build a Scheduling Master Schedule:

1. On the Scheduling Setup page, copy the current MST to the SMS; modify as needed.
2. On the Flex SMS Board or SMS Board:
 - Use the **SMS Builder** to mass add sections.
 - Use **Add Class/Copy Class** buttons to add more sections and copy existing sections.
3. On the Scheduling Master page:
 - **Add** sections one at a time.
 - **Add** one section, then **Copy** the section as many times as needed.

How many sections do you need to add?

Just a few? Use the Scheduling Master page, since ALL the fields are there.

Lots? Use the SMS Board, since you can mass add sections.

Build a Scheduling Master Schedule using Copy the MST to the SMS on the Scheduling Setup Page

1. In SMS & SSS Initialization, select **Blank out the SMS Table**. Typically, you'd also **Blank out the SSS Table** (Course Requests).
2. Press **Initialize Scheduling** button.

SMS & SSS Initialization

Course Requests

- Do Nothing with the SSS Table
- Blank out the SSS Table
- Copy current student classes to SSS table, keep as prescheduled.
- Copy current student classes as course requests only.

Scheduling Master Schedule

- Do Nothing with the SMS Table
- Do Nothing with the SMS Table, but Copy Flex Periods (FTF)
- Blank out the SMS Table
- Copy current master schedule (MST) table to the new SMS table.

Select which terms to copy:

- Year Long Classes
- Fall
 - Quarter/Trimester 1
 - Quarter/Trimester 2
- Spring
 - Quarter/Trimester 3
 - Quarter/Trimester 4

Flex Scheduling Using Next Year's Grade Levels!

2 Initialize Scheduling

3. After receiving the email indicating the process ran, return to the **Scheduling Setup** page.
4. In SMS & SSS Initialization, select **Copy current master schedule (MST) table to the new SMS table**.
5. Press **Initialize Scheduling** button. After receiving the email indicating the process ran, proceed with SMS modifications using SMS Board or Scheduling Master page.

To identify inactive sections in your MST, run this Query:

```
LIST MST CRS MST.SE CRS.CN CRS.CO MST.STG MST.STG? IF MST.STG > ''
```

SMS & SSS Initialization

Course Requests

- Do Nothing with the SSS Table
- Blank out the SSS Table
- Copy current student classes to SSS table, keep as prescheduled.
- Copy current student classes as course requests only.

Scheduling Master Schedule

- Do Nothing with the SMS Table
- Do Nothing with the SMS Table, but Copy Flex Periods (FTF)
- Blank out the SMS Table
- Copy current master schedule (MST) table to the new SMS table.
 - How would you like to handle Inactive MST records?
 - Copy them, but leave them inactive
 - Do Not Copy Inactive Sections
 - Copy and Activate them
 - Copy them, but Activate certain codes

Select which terms to copy:

- Year Long Classes
- Fall
 - Quarter/Trimester 1
 - Quarter/Trimester 2
- Spring
 - Quarter/Trimester 3
 - Quarter/Trimester 4

Usually, when copying the MST to the SMS, all term's sections should be copied.

Flex Scheduling Using Next Year's Grade Levels!

5 Initialize Scheduling

Inactive sections exist in my MST. Should they be copied along with the active sections? In this example, no.

Build a Scheduling Master Schedule using the SMS Builder:

On the SMS Board, press the **SMS Builder** button.

1. Type the Course Number or Course Name.
2. Check the Conflict Matrix for period(s) with fewest conflicts.
3. Add the count of how many sections per period to add.
4. Each section specified in No. 3 will have its own row. Add data for each section.
5. Press **Add Sections** button.

The screenshot shows the 'Scheduling Master Schedule - SMS Builder' interface. At the top, there are buttons for 'it Stus', 'SMS Builder' (highlighted with a red box), and 'Find B'. Below this is a warning message: 'The Course Request by Grade totals honor keep/skip. If you did not select "Include Inactive Students" in your KEEP/SKIP query, Pre-Enrolled Students (STU.TG = "") will NOT be included in the calculation!'.

1. **Select a Course**: A text input field contains '0010 - PE 9'.

Course Request by Grade table:

	9	10	11	12	Total
	481	0	0	0	481

2. **Scheduling Conflict Matrix** table:

Period	Term 1	Term 2	Term 3	Term 4
P0	1829	1829	1949	1949
P1	2137	2137	2239	2239
P2	2351	2351	2249	2249
P3	2379	2379	2379	2379
P4	2307	2307	2530	2530
P5	2357	2357	2357	2357
P6	1520	1520	1764	1764
P7	188	188	159	159
P7W	0	0	0	0
P8	0	0	0	0
P9	0	0	0	0
P9M	0	0	0	0

3. **Sections to Add** table:

Period	Count
P0	0
P1	3
P2	1
P3	1
P4	1
P5	0
P6	2
P7	2
P7W	0
P8	0
P9	0
P9M	0

4. **Section List** table:

PD	Sem	Teacher	Room	CR	GN	LO	HI	SchdGrp	TmCrsgp	TM#	SemGp	Tag	TR	Class Calendar	Max
All	Y	894705 - Dou	Gyr	5		9	9	-No...	-No...		-No...	No t...		P1-6/26/...	40
P1	Y	894705 - Dou	Gyr	5		9	9	-No...	-No...		-No...	No t...		P1-6/26/...	35
P1	Y	894838 - Robi	Gyr	5		9	9	-No...	-No...		-No...	No t...		P1-6/26/...	35
P1	Y	894705 - Dou	Gyr	5		9	9	-No...	-No...		-No...	No t...		P1-6/26/...	35
P2	Y	894838 - Robi	Gyr	5		9	9	-No...	-No...		-No...	No t...		P2-6/26/...	40
P3	Y	894705 - Dou	Gyr	5		9	9	-No...	-No...		-No...	No t...		P3-6/26/...	40

5. **Add Sections** button (highlighted with a red box), along with 'Reset' and 'Exit' buttons.

Build a Scheduling Master Schedule using SMS Board buttons:

Using **Add Class**:

1. Click on the cell corresponding to the period/teacher.
2. Press the **Add Class** button.
3. Add the section's information at the top.
4. Press **Save**.

Farrell, Bentley 894831	PE/Y/50	1	
Farrell, Bentley 894831			
Figueroa, Naima 894798	PreCalculus/Y/28	H Adv Alg CP/Y/40	
Fleming, Oliver 894709	English 9 Cp/Y/28	English 9 Cp/Y/27	

2 Add Class Move Class Copy Class

Section Sem	Flex Period	Class Calendar	Course	Department							
1001	Y	P1-8:00 AM...	P1-6/26/20...	0011 - PE							
				Phys Ed/Health							
Teacher	Credit	Exclude	Gr Range	SchdGrp	TmCrsgp	Team#	SemGp				
894831 - Farrell, Be...	5	- No ...	9 12	- No ...	- No ...	0	- No ...				
TR	GN	Room	Status	School(if other than the current)	Max	Total	Male	Female	O-GN	Left	PreSch
		Gym	- Active		40	0	0	0	0	0	0

4 Save

Using **Copy Class**:

1. Click on the section that should be copied.
2. Click on the **Copy Class** button; the button will change to **Cancel Copy**.
3. Click on the cell corresponding to the period/teacher where the new section should be copied.

Farrell, Bentley 894831	PE/Y/50	1	3	
Farrell, Bentley 894831				
Figueroa, Naima 894798	PreCalculus/Y/28	H Adv Alg CP/Y/40	PreCalcu	
Fleming, Oliver 894709	English 9 Cp/Y/28	English 9 Cp/Y/27	Hon Eng 10	

Add Class Move Class 2 Copy Class Drop Class List

Add a Section on Scheduling Master page

- Add a new section
- Change or Delete an existing section
- Credit and Grd Range come from Course
 - Grd Range 0-0 is Kindergarten
- Max and Room come from Scheduling Info section on Staff page.
 - Room prints on Locator Cards report.
 - Max of 0 means that no students will schedule into it.

Section	Sem	Flex Period	Class Calendar	Course	Room	Tag	Sch Exc			
1001	Y	P3-10:05 AM to 10:55 AM	P3-6/26/2023 to 6/29/2024 (265 days) View Calendar	0010 - PE 9	B4		<input type="checkbox"/>			
Credit	School (if other than the current)							MultiTchr		
5.00										
Grd Range	Sch Grp							Arena		
9-9										
Class ID	Max	Total	Male	Female	Other Gender	Left	PreSch	Multi-School Gradebook Enabled	Attendance Ruleset	
0	32	0	0	0	0	32	0	<input type="checkbox"/>		
Ed Svc	Lang Instr	Instr Strategy	Fund Src	CTE Prvdr	CTE V-Code	Ind Study	Dist Ling	Itinerant Teacher	Exempt from Time Restrictions	Class Link
					0					
Crs Content Subcategory			Charter Non-Core			AP/IB Crs. Code Cross Ref.				
Online Crs Instr. Type			Local Assign Option			High Quality CTE Crs				
User 1	User 2	User 3	User 4	User 5	User 6	User 7	User 8			
Add Copy Change Delete Print Scheduling Master Details										

Staff Member	Primary School	Primary Teacher	Staff Role	Attendance Prm	Gradebook Prm	Grade Reporting	Stu Access	State Rpt	Status
894956-Austin, Yareli	894-Flex Soaring Eagle High School	Yes	087 - Teacher	Yes	Full	Yes	Yes	Yes	

School	Room	Low Grd	High Grd	Max Stu/Period	Max Stu/Day
Flex Soaring Eagle High School	B4	9	12	32	0

More fields on the Scheduling Master page

- **Exclude** (don't show this section on Grades, Attendance or both)
- **SemGp** (same **SemGp** will force two sections for a pair of courses into different terms)
- Use the **Copy** button to quickly create multiple sections:
 - **Add** a section
 - **Copy** the section
 - Change fields as needed
 - **Save**
 - Repeat
- **Sch Exc** field
 - Only at a Flex school
 - If checked, the Scheduler will not put students into this section; students will need to be hand-scheduled into it

Scheduling Master Schedule														
Section	Sem	Flex Period		Class Calendar				Course		Room	Tag	Sch Exc		
4	Y	P0-7:05 AM to 7:55 AM		P0-6/26/2023 to 6/29/2024 (265 days) View Calendar				0001 - No Zero Period		ADM		<input type="checkbox"/>		
Credit	School (if other than the current)			Prgm	Hrly Prg	Exclude	ADA	Supp Att	MultiTchr					
0.00						Z		<input type="checkbox"/>						
Grd Range		SchGrp	TmCrsgp	Team#	SemGp	Track	Gender	Arena						
9-12				0										
Class ID	Max	Total	Male	Female	Other Gender	Left	PreSch	Multi-School Gradebook Enabled		Attendance Ruleset				
0	500	0	0	0	0	500	0	<input type="checkbox"/>						
Ed Svc	Lang Instr	Instr Strategy	Fund Src	CTE Prvdr	CTE V-Code	Ind Study	Dist Lrng	Itinerant Teacher	Exempt from Time Restrictions		Class Link			
					0									
Crs Content Subcategory				Charter Non-Core				AP/IB Crs. Code Cross Ref.						
Online Crs Instr. Type				Local Assign Option				High Quality CTE Crs						
User 1	User 2	User 3	User 4	User 5	User 6	User 7	User 8							
<input type="button" value="Add"/> <input type="button" value="Copy"/> <input type="button" value="Change"/> <input type="button" value="Delete"/> <input type="button" value="Print Scheduling Master Details"/>														

Even more fields on the Scheduling Master page

- MultiTchr
- CALPADS is green
- If it is green, don't guess!

Scheduling Master Schedule

Section	Sem	Flex Period	Class Calendar	Course	Room	Tag	Sch Exc			
120	F	P4-11:00 AM to 11:50 A...	P4-6/23/2025 to 6/25/20...	Civics Cp	D4					
View Calendar										
Credit	School (if other than the current)	Prgm	Hrly Prg	Exclude	ADA	Supp Att	MultiTchr			
5.00	0									
Grd Range	SchGrp	TmCrsgp	Team#	SemGp	This Section is Taught by Only One Teacher					
12-12			0	A	<input type="checkbox"/> 01 Team Teaching (at same time) <input type="checkbox"/> 02 Job Sharing (alternating) <input type="checkbox"/> 09 No Multi-Teacher					
Class ID	Max	Total	Male	Female	Other Gender	Left	PreSch	Multi-Sch		
0	36	0	0	0	0	36	0			
Ed Svc	Lang Instr	Instr Strategy	Fund Src	CTE Prvdr	CTE V-Code	Ind Study	Dist Lrng	Itinerant Teacher	Exempt from Time Restrictions	Class Link
4					0			Not Applicable		
Crs Content Subcategory		Charter Non-Core		AP/IB Crs. Code Cross Ref.						
Online Crs Instr. Type			Local Assign Option			High Quality CTE Crs				
						Not				
User 1	User 2	User 3	User 4	User 5	User 6	User 7	User 8			
Save <input type="button" value="Cancel"/>										

Section Staff Members

Staff Member	Primary School	Primary Teacher	Staff Role	Attendance Prm	Gradebook Prm	Grade Reporting	Stu Access	State Rpt	Status
894693-Olsen, Kamden	894-Flex Soaring Eagle High School	Yes		Yes*	Yes*	Yes*	Yes*	Yes*	
894607-Blevins, Bruno	894-Flex Soaring Eagle High School	No		Yes	Full	No	Yes	No	

Complex Scheduling tag fields on the Scheduling Master page

Student has Course Requests, but you want to apply rules for the Scheduler to follow, to guide which section(s) the student will schedule into.

Complex Scheduling tags:

- SchGrp: Schedule Group
- TmCrsGp and Team#: Team Course Group and Team Number
- Class Link

Keep in mind: the student's Course Requests provide the Courses that the student will take. Complex Scheduling tags affect **which** section(s) will be scheduled, for a Course.

Scheduling Master Schedule																										
Section	Period	Blk	Sem	Course	Teacher	Role	Highly Qlfd Tchr	Room	Tag	Sch Exc	Credit	School (if other than the current)	Prgm	Hrly Prg	Exclude	ADA	Supp Att	Tch#2	Role	HQT	Tch#3	Role	HQT	MultiTchr		
89	4	1	Y	0315 - Hon Eng 10 CP	636 - Goode		Y	C3		<input type="checkbox"/>	5.00						<input type="checkbox"/>									
Grd Range	SchGrp	TmCrsGp	Team#	SemGp	Track	Gender	Arena	SplitTerm	Mon	Tue	Wed	Thu	Fri	Sat	Class ID		Max	Total	Male	Female	Other Gender	Left	PreSch	Multi-School Gradebook Enabled	Alt Ed Sched Enabled	Attendance Ruleset
10-12			0					MTWTF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	31	19	7	12	0	12	0	<input type="checkbox"/>	<input type="checkbox"/>						
Ed Svc	Lang Instr	Instr Strategy	Fund Src	CTE Prvdr	CTE V-Code	Ind Study	Dist Lrng	Itinerant Teacher	Exempt from Time Restrictions		Class Link															
Designated and Integrated ELD Instruction But Not Primary Language Instruction					0																					

Documentation:

- Complex Schedules category: <https://support.aeries.com/support/solutions/folders/14000118502>
- Group Scheduling Examples: Which Strategy to Use? <https://support.aeries.com/support/solutions/articles/14000138889-group-scheduling-examples-which-strategy-to-use->

Complex Scheduling tags: why use Schedule Group tags?

- Specific students should go into specific sections
- Often called Teams, Houses, or Academies
- Schedule Group tag:
 - For students (STU.SG)
 - For sections (SMS.SG; MST.SG)

Scheduling Master Schedule						
Section	Period	Blk	Sem			
89	4	1	Y	0315 - Hon Eng 10		
Credit		School (if other than the current)				
5.00						
Grd Range	SchGrp	TmCrsGp	Team#			
10-12	AA		0			
Class ID	Max	Total	Male	Female	Other Gend	
0	31	19	7	12	0	

Next Schl	Next Grd	Next Tchr	Sched Grp
	10	Unassigned (0)	Schedule Group AA (AA)
Next Grid Code	Next Prg	Next Prg 1	Next Prg 2
	Regular Program		
Next ResSchl	Next IntDist	Next ResDist	

bottom of Demographics page

Import Add Change Delete

Course Request	Term View	Term and Day of Week View			
Counselor	Period	Range	Schedule Group		
623	Monarch	0	9	Schedule Group AA	Change

Documentation:

Complex Schedules: Teams, Houses, Academies, etc.:

<https://support.aeries.com/support/solutions/articles/14000081449-complex-schedules-teams-houses-academies-etc->

Complex Scheduling tags: how to apply Schedule Groups?

1. Confirm, create, or ask your Aeries Administrator to create Schedule Group codes on Update Code Table page (field MST.SG).
2. Tag sections with appropriate Schedule Tags (field SMS.SG) on either Scheduling Master page or on SMS Board.
3. Tag students on Demographics (or Course Requests page or Classes page – these are all the same field STU.SG) with appropriate Schedule Tags.
4. Mass Schedule (Schedule All Students or SMS Board), or schedule one student using Reschedule button on Courses Requests.
 - Students tagged with a Schedule Group will schedule into sections tagged with matching Schedule Group OR into sections with blank Schedule Group.
 - Students with blank Schedule Group will **not** schedule into sections with a Schedule Group.
Students with blank Schedule Group will schedule into sections with blank Schedule Group.

Update Code Table

Table and Field Selection

Table: MST Field: SG

Fixed Codes

Code	Description	Category
------	-------------	----------

Current Table-Field Codes

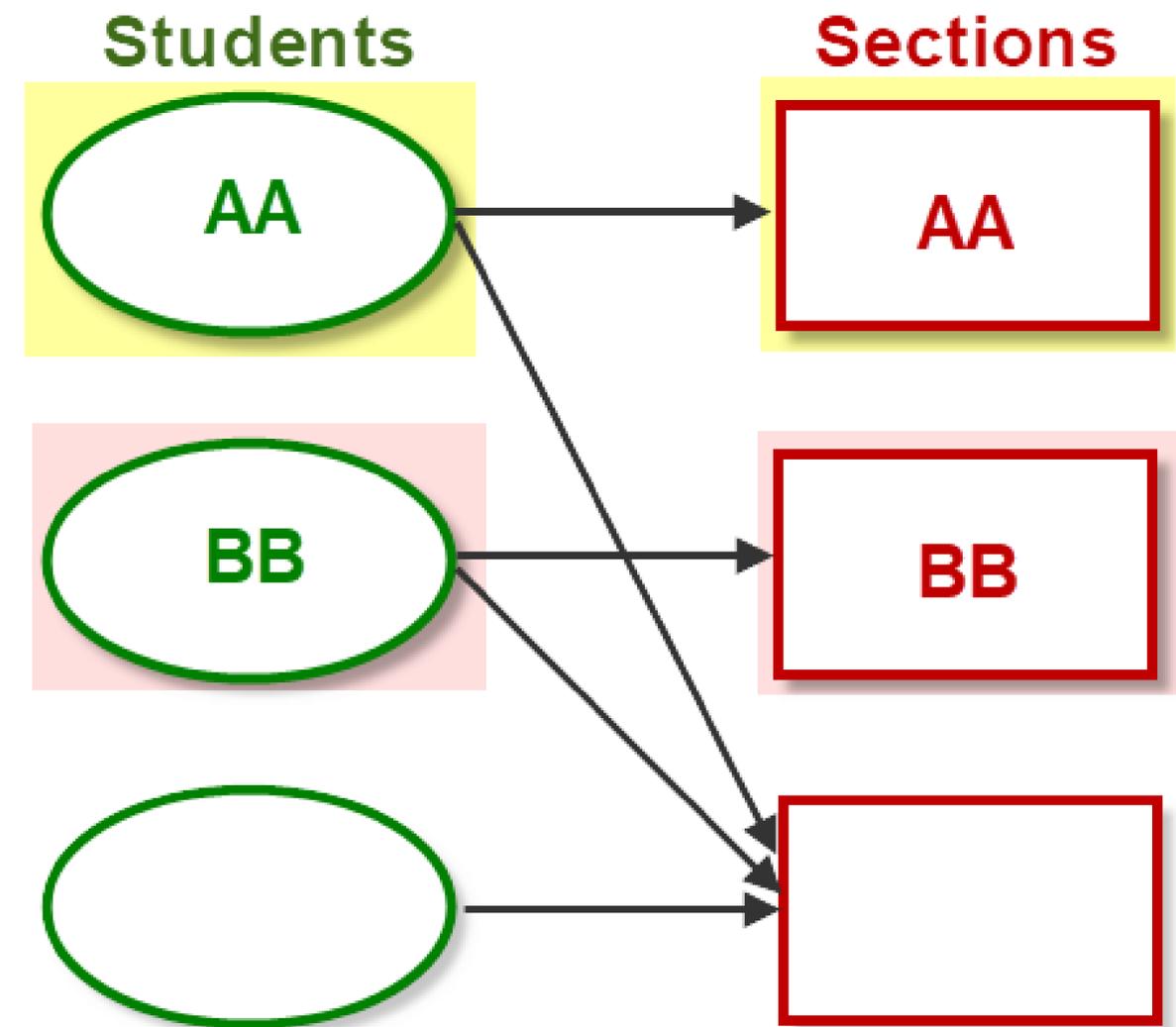
Code	Description	Category	Amount	Sort	Tag
+ Add New Record					
	No Group		0.00		
	A 7th Grd Inv Group A		0.00		
	AA Schedule Group AA		0.00		
	B 7th Grd Inv Group B		0.00		
	BB Schedule Group BB		0.00		

Complex Scheduling tags: Schedule Group example

Students tagged with Schedule Group AA go into sections tagged Schedule Group AA OR into sections with a blank Schedule Group.

Students tagged with Schedule Group BB go into sections tagged Schedule Group BB OR into sections with a blank Schedule Group.

Students with a blank Schedule Group go into sections with a blank Schedule Group.



Complex Scheduling tags: why use Team Course Group and Team# tags?

- Certain sections (or all sections) are “teamed”
- If a student schedules into one of the sections in a team, the student should schedule into the other sections of the team
- Two or more sections are in a team
- No tagging of students
- Team / Course Group and Team# can be added on the SMS board
- Class Link will accomplish the same result (but uses a different tag/field)
 - Pro: it is easier to “get” the concept of Class Link
 - Con: Class Link can’t be added on the SMS Board

Scheduling Master Schedule							
Section	Period	Blk	Sem	Course			
89	4	1	Y	0315 - Hon Eng 10 CP			
Credit	School (if other than the current)			Prgm	Hrly Prg		
5.00							
Grd Range	SchGrp	TmCrsgp	Team#	SemGp	Tra		
10-12		A	100				
Class ID	Max	Total	Male	Female	Other Gender	Left	PreSc
0	31	19	7	12	0	12	0

Documentation:

Complex Schedules: Team / Course Group and Team Number Fields:

<https://support.aeries.com/support/solutions/articles/14000081450-complex-schedules-team-course-group-and-team-number-fields>

Complex Scheduling tags: how to apply Team / Course Group and Team Number?

1. Confirm, create, or ask your Aeries Administrator to create Team / Course Group codes on Update Code Table page (field MST.CG).
 - The Team# field does not need codes.
2. On Scheduling Master page or on SMS Board, tag ALL sections that will be part of a team with a TmCrsGp code (SMS.CG).
 - **This tag identifies that these sections are included in a group of teams.**
3. On Scheduling Master page or on SMS board, tag the sections in a specific Team with the same Team# (SMS.TM).
 - **This tag identifies that these sections are on the SAME team in group.**
4. Mass Schedule (Schedule All Students or SMS Board) or schedule one student using Reschedule button on Courses Requests.
 - Students will schedule into the specific sections of one single team.

Update Code Table

Table and Field Selection

Table: MST Field: SG

Fixed Codes

Code	Description	Category
------	-------------	----------

Current Table-Field Codes

Code	Description	Category	Amount	Sort	Tag
	No Group		0.00		
	A 7th Grd Inv Group A		0.00		
	AA Schedule Group AA		0.00		
	B 7th Grd Inv Group B		0.00		
	BB Schedule Group BB		0.00		

[+ Add New Record](#)

Complex Scheduling tags: Team / Course Group and Team Number example

Middle School core classes: all Language Arts and Social Studies sections are tagged with TmCrsGp A.

Teacher Smith's Language Arts section in period 1 and Social Studies section in period 2 are both tagged Team 100.

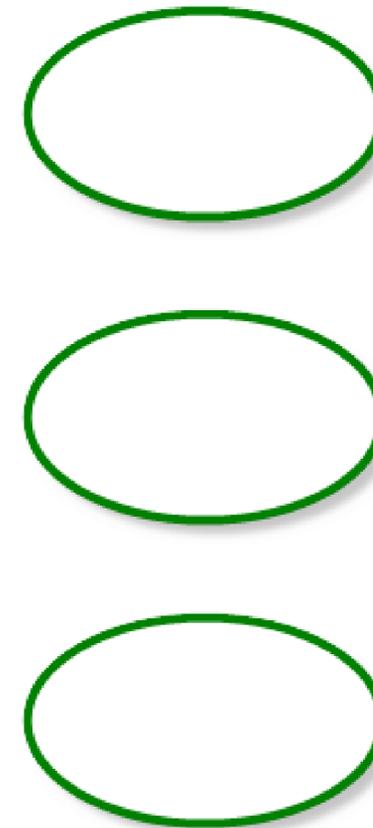
TmCrsGp	Team#
A	100

Teacher Lopez's Language Arts section in period 3 and Social Studies section in period 4 are both tagged Team 101.

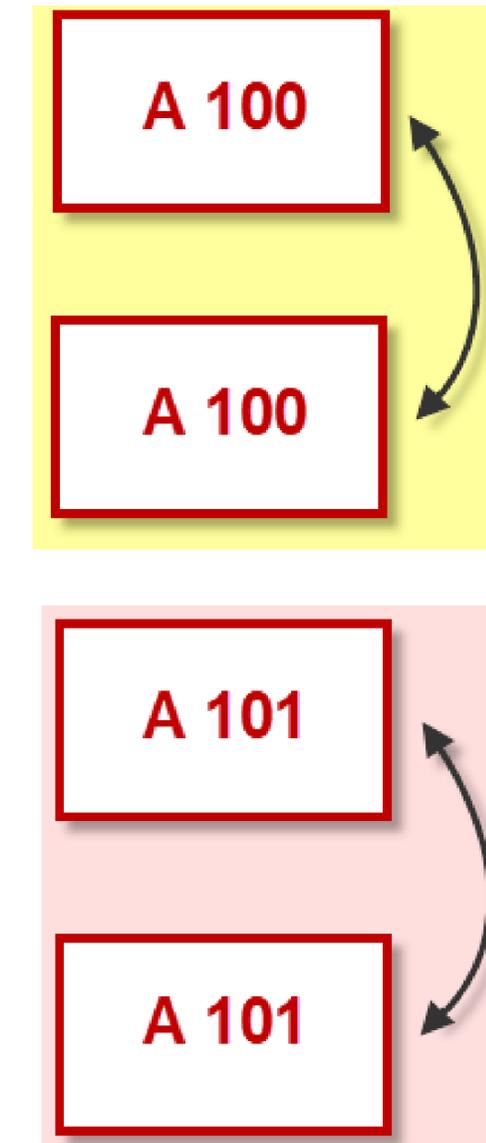
TmCrsGp	Team#
A	101

Students schedule into Language Arts and Social Studies sections in Team 100 or Team 101.

Students



Sections



Team Course Group A
Team 100 and Team 101

Complex Scheduling tags: why use Class Link tags?

- Certain sections (or all sections) are linked
- If a student schedules into a section with a Class Link, the student should schedule into the linked section(s)
- No tagging of students
- Team / Course Group and Team# will accomplish the same result (but uses two different tags/fields)
 - Pro: it is easier to “get” the concept of Class Link
 - Con: Class Link can’t be added on the SMS Board

Scheduling Master Schedule																											
Section	Period	Blk	Sem	Course	Teacher	Role	Highly Qlfd Tchr	Room	Tag	Sch Exc	Credit	School (if other than the current)	Prgm	Hrly Prg	Exclude	ADA	Supp Att	Tch#2	Role	HQT	Tch#3	Role	HQT	MultiTchr			
357	2	1	F	0714 - Economics Cp	834 - Wells		H	D3		<input type="checkbox"/>	5.00						<input type="checkbox"/>										
Grd Range	SchGrp	TmCrsGp	Team#	SemGp	Track	Gender	Arena	SplitTerm	Mon	Tue	Wed	Thu	Fri	Sat	Class ID	Max	Total	Male	Female	Other	Gender	Left	PreSch	Multi-School	Gradebook Enabled	Alt Ed Sched Enabled	Attendance Ruleset
12-12			0	A				MTWTF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	36	32	16	16	0	4	0		<input type="checkbox"/>	<input type="checkbox"/>						
Ed Svc	Lang Instr	Instr Strategy	Fund Src	CTE Prvdr	CTE V-Code	Ind Study	Dist Lrng	Itinerant Teacher	Exempt from Time Restrictions	Class Link																	
Designated and Integrated ELD Instruction But Not Primary Language Instruction					0					EG1																	

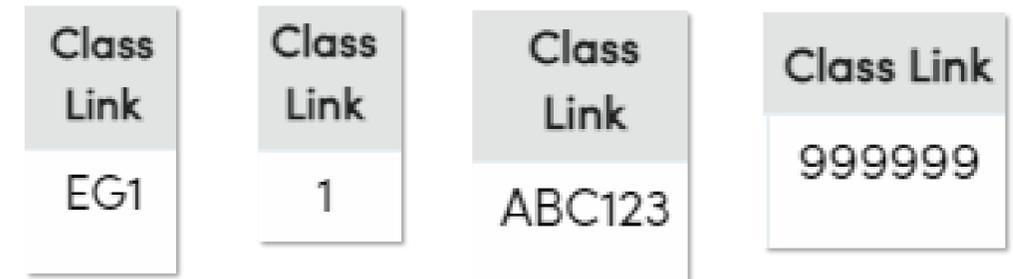
Documentation:

Class Link:

<https://support.aeries.com/support/solutions/articles/14000136569-class-links>

Complex Scheduling tags: how to apply Class Links?

1. On Scheduling Master page, tag each section that should be linked with the same Class Link (up to 6 characters; numbers and/or letters).
 - Can't be added on SMS Board.
2. Mass Schedule (Schedule All Students or SMS Board) or schedule one student using Reschedule button on Courses Requests.
 - Students will schedule into sections that are linked.



Complex Scheduling tags: Class Links example

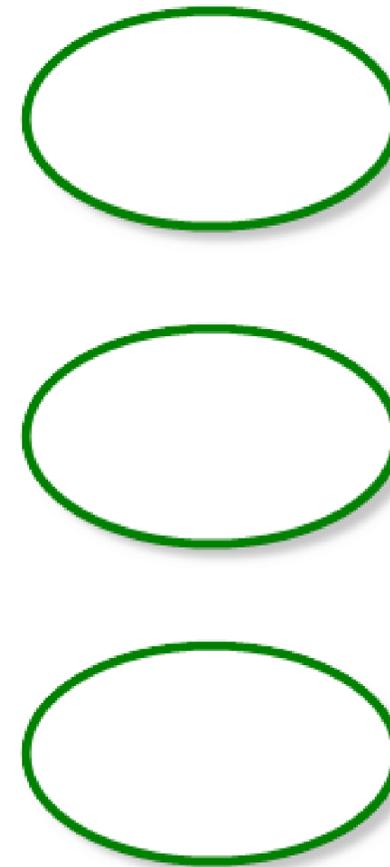
Middle School core classes: all Language Arts and Social Studies sections will be Class Linked.

Teacher Smith's Language Arts section in period 1 and Social Studies section in period 2 have Class Link of S1. (If Smith teaches another set of LA/SS, those could be S2 or S3 or S4.)

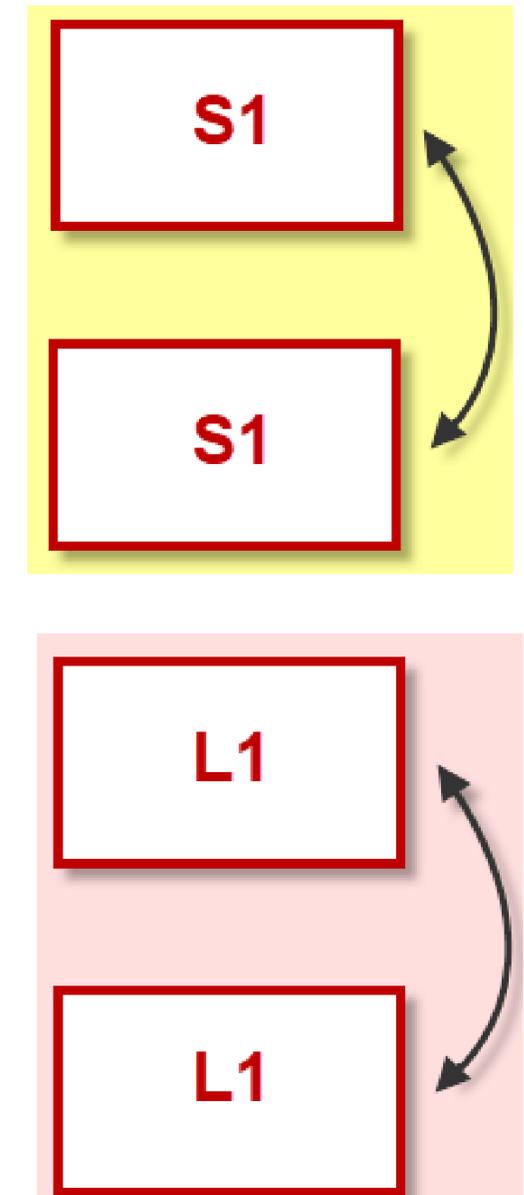
Teacher Lopez's Language Arts section in period 3 and Social Studies section in period 4 have Class Link L1. (Ditto: other set could be L2 or L3, etc.)

Students schedule into Language Arts and Social Studies: S1 sections **or** L1 sections.

Students



Sections



Class Links: S1 and L1

Scheduling Students: Key Topics

- Backup and Restore Scheduling Results
- Reports to run before running the Scheduler (mass scheduling students)
- Mass scheduling students
 - Schedule All Students page
 - Flex SMS Board/SMS Board
- Course Requests page
 - Add/delete/modify course requests
 - Lock courses
 - Address scheduling conflicts/rejects
 - Schedule individual students
- Use reports to guide building/modifying/finalizing the Scheduling Master Schedule
- Copy existing sections, including sections with students
- Where to go next

Running the Scheduler to mass add students to sections



Hand scheduling students to fix rejects



Backup and Restore Scheduling Results:

Create a saved backup of scheduling tables, including SSS (Course Requests) and SMS (Scheduling Master Schedule).

Backup and Restore Scheduling Results **Create a Backup**

Scheduling Backups

Seq	Date/Time	Description	Tot Stus	Crs Reqs	Rejects
1	2/15/2023 12:00 AM	Original Demo Data	1987	12511	303
2	2/15/2023 12:00 AM	Original Demo Data - Unscheduled	1987	12511	0
3	2/15/2023 12:00 AM	Original Demo Data - No SMS	1987	12511	0
4	2/15/2023 12:00 AM	Original Demo Data - Some Sections	1987	12511	0

Backup Current Scheduling Tables (SSS, SMS and related tables) **1. Press Backup button**

Restore SSS, SMS and related tables from Selected Backup

Delete Selected Backup

Backup Settings

Description: Short Why/When For this Backup

Comment: Longer description of why you created a backup, so that you can choose the correct one to restore if you need to.

OK Cancel **3. Press OK**

2. Describe/add comment so you know what the backup contains.

Backup and Restore Scheduling Results **Restore a Backup**

Scheduling Backups

Seq	Date/Time	Description	Tot Stus	Crs Reqs	Rejects
1	2/15/2023 12:00 AM	Original Demo Data	1987	12511	303
2	2/15/2023 12:00 AM	Original Demo Data - Unscheduled	1987	12511	0
3	2/15/2023 12:00 AM	Original Demo Data - No SMS	1987	12511	0
4	2/15/2023 12:00 AM	Original Demo Data - Some Sections	1987	12511	0
5	10/31/2022 11:54 AM	All core classes added to SMS Core sections in SMS; electives not added, all course requests added for all grades; Friday 5/27	1987	12511	303

Backup Current Scheduling Tables (SSS, SMS and related tables) **1. Click backup to select it**

Restore SSS, SMS and related tables from Selected Backup **2. Press Restore button**

Delete Selected Backup

Backup often.

Restore carefully! Existing data will be written over!

Prescheduling Edit Listing

- Run after SMS built, but before scheduling
- Predicts potential rejects

Flex Soaring Eagle High School

12/4/2024

2024-2025

PRESCHEDULING EDIT LISTING

Page 4

Student Name	GrdGender	STUID	Crs.	Course Title	Per	Comments	
Yoder, Olive	9 Female	89400702	Invalid course ID/not in master schedule				
			0961	Algebra A	_____	I *** Invalid Course ***	
			0017	Beg Dance	F_____		
			0946	English 9	A_____		
			0011	PE	A_____	G *** Grade Range ***	
			0954	Physical Scienc	F_____		
			0918	Reading Fund	A_____		
Abbott, Amanda	10 Female	89400002	Invalid course ID/not in master schedule				
			0656	Biology	F_____		
			0608	Geometry Cp	A_____		
			0315	Hon Eng 10 CP	A_____		
			0970	Leadership	A_____		
			30043	ROP Child Devlp	_____	I *** Invalid Course ***	
			0417	Spanish II	A_____		
			0045	Volleyball	A_____		
0701	World Hist. Cp	A_____					
Baird, Aryan	10 Male	89400177	Period range problem				
			0582	Adv Band	A_____	P *** Period Range ***	
			0656	Biology	F_____	P *** Period Range ***	
			0302	English 10 CP	A_____	P *** Period Range ***	
			0624	Hon Geo/Trg CP	F_____	P *** Period Range ***	
			0015	Marching PE	A_____	P *** Period Range ***	
			0416	Spanish I	A_____	P *** Period Range ***	
			0701	World Hist. Cp	A_____	P *** Period Range ***	

Students with Duplicate Course Requests

- Should the student have two Course Requests and/or sections scheduled for the same Course?
- For one student, delete the duplicate on Course Requests
- Mass deletion on Delete Duplicate SSS Records

Flex Soaring Eagle High School

11/2/2022

2022-2023		Students With Duplicate Course Requests				Page 1	
Student Name	Student ID	Grd	Course Name	Course ID	# of Duplicates	Section #	
Ferguson, Adam Valentino	89402138	10	Ind Study	0908	2	243 341	
Griffin, Kendal Makenzie	89401542	10	Study Skills	0095	2	0 2935	
Mclaughlin, Damian Krish	89402128	11	Ind Study	0908	2	243 613	
Morse, Alicia Erika	89400484	11	Economics Cp	0714	2	2885 2953	
Rodgers, Conor Rocco	89402153	10	Ind Study	0908	2	457 2828	

Reports to run before scheduling students: Scheduling Master Schedule Errors

- Scheduling Process Dashboard C. 4.
- Sections missing:
 - Flex Period
 - Class Calendar
 - Primary Teacher
- Sections with wrong year's Flex Period or Class Calendar

Print Scheduling Master Schedule Errors Report Options

Report Format: PDF ▼

Report Delivery: None ▼

Skip Inactive Sections

Print Staff ID

Sort by Error

[Run Report](#)

Flex Soaring Eagle High School

6/19/2025

2024-2025

SCHEDULING MASTER SCHEDULE Error Report (Flex)

Page 1

Sec#	Sm	Crs ID	Course Title	Primary Teacher	Room	Period	Time	Calendar	Errors
294	Y	0304	English 12 CP		E1	P1	8:00 AM - 8:50 AM	P1	Missing Primary Teacher
89	Y	0315	Hon Eng 10 CP	Ewing, K	C3			P4	Missing Flex Period
235	F	0704	Civics Cp	Olsen, K	D4	P1	8:00 AM - 8:50 AM		Missing Class Calendar

* Denotes Inactive Section

Reports to run before scheduling students: Scheduling Master Schedule

- Sort by Course and Period (or maybe by Teacher and Period)
- Check data entry for the Scheduling Master Schedule:
 - Teacher, Grade Range (Low/High), Max
 - Check complex scheduling section tags
 - At Flex schools, be sure to look for sections missing a Flex Period (Period) or Class Calendar (Days)

Print Scheduling Master Schedule
Report Options

Report Format: PDF

Report Delivery: None

Fall Spring Year

Period and Section
 Room and Period
 Course and Period
 Teacher and Period
 Department and Period
 by Course ID
 by Course Title

Page Break on Change
 Skip Inactive Sections
 Skip Classes Without Students
 Skip Teacher Aides
 Include TAs in Class Averages
 Include TAs in Class Totals

Flex Soaring Eagle High School

JUL 20 2023

10:07 /

2023-2024

SCHEDULING MASTER SCHEDULE BY COURSE and PERIOD

Pag

Sec#	Period	Sm	Days	Crs ID	Course Title	Dept	Primary Teacher	Room	Credit	Gn	Low	High	Max	Tot	Boys/Pct	Girls/Pct	OGn/Pct	Pre	Sch Grp	Crs Grp	TM Nm	Sm Grp	
3033		Y	P4	0010	PE 9	P	894835 Nichols, P	GYM2	5.0		9	9	25	0	0	0	0	0	0				
531	P0	Y	P0	0010	PE 9	P	894702 Tyler, J	Gym4	5.0		9	9	55	55	31	56	24	44	0	0			
1059	P1	Y	P1	0010	PE 9	P	UNASSIGNED		5.0		9	9	50	0	0	0	0	0	0				C
1437	P1	Y	P1	0010	PE 9	P	894702 Tyler, J	Gym4	5.0					5	26	47	29	53	0	0			
	P2			0010	PE 9		894607 Blevins, B	G8	5.0					5	26	47	29	53	0	0			
	P3			0010	PE 9		894607 Blevins, B	G8	5.0					5	31	56	24	44	0	0			A 100
	P3			0010	PE 9		894831 Farrell, B	Gym	5.0		9	9	55	55	31	56	24	44	0	0			A 100
	P3			0010	PE 9		J		5.0		9	9	0	0	0	0	0	0	0				
	P4			0010	PE 9	P		B G7	5.0		9	9	55	55	25	45	20						
2806	P4	Y	P4	0010	PE 9	P		Q21	5.0		K	K	55	0	0	0	0						
1164	P5	Y		0010	PE 9	P		s, B G8	5.0		9	9	55	55	30	55	25	45					

Blank Flex Period or Class Calendar? Flex scheduler won't put students into the section

Should the section have a teacher?

Should the section have a room?

Grade 0 is Kindergarten

Are these correct?

Max = 0? The scheduler will not put students into the section

Schedule All Students: Mass Schedule

- Mass lock/unlock scheduled sections
- Run the Scheduler; run reports; move sections; repeat

Schedule All Students

Scheduling Options

Automatically schedule the Alternate Course Request if the primary is a reject

Let section's total number of students go over the max (SMS.MX). Helps to see where more sections may be needed.

Does not mean pre-enrolled (STU.TG = *), who are included by default.

Schedule without honoring complex scheduling tags.

Scheduler is so fast nowadays ...

For 4x4 block schedules: tries to balance Courses by AcaWt (CRS.AC).

Clears all "temporary" locks, not Perm Lks (which will not be cleared by this button).

Every Course Request with an associated section will be locked.

Clears all the section numbers from associated unlocked Course

Honors KEEP and SKIP.

Admin to SMS permissions required to Lock Mass Scheduling.

Grade Sequence:

- Ignore Grade Level
- Schedule Low to High
- Schedule High to Low

Student Sequence:

- Alphabetically
- Reverse Alpha
- Randomly

order of scheduling

Mass Update Student Schedules

- Lock All Students' Schedules
- Lock All Complete Schedules
- Unlock All Students' Schedules
- Clear All Unlocked Scheduling Results
- Clear Scheduling Reject Reasons

Run Scheduler

- Schedule All Students

Lock/Unlock Mass Scheduling

- Lock Mass Scheduling

Options:

- Schedule Alternates
- Ignore Class Maximums
- Include Inactive Students
- Ignore Group Codes
- Balance Academic Weight
- 10 Max Time Per Student

Warning: Scheduling Using Next Year's Grade Levels

- Same options as **Schedule All Students** page, except you can't mass lock/unlock scheduled sections here
- Run the Scheduler; run reports; move sections; repeat

2022-2023 Flex Soaring Eagle High School

Department

Crsgp Team# SemGp

Female O-GN Left PreSch

Save

Display Scheduling Options Color Codes Scheduling Statistics

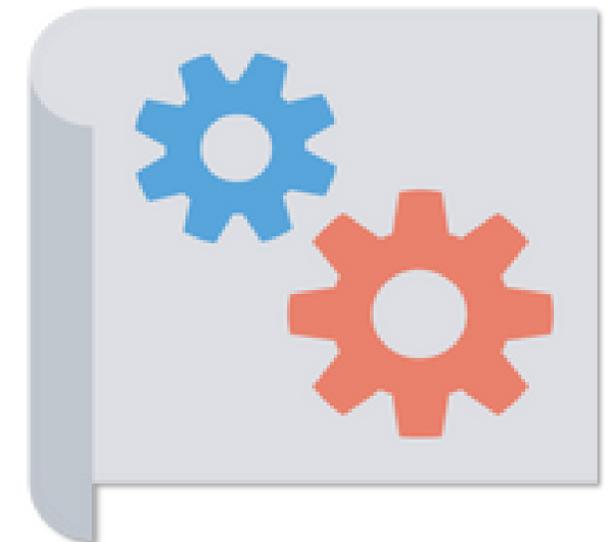
Total Students: 1974
 All Scheduled: 1705
 Have Rejects: 269
 Percent OK: 86.4%%
 Elapsed Time (seconds): 4 sec

Save And Reload

P2 AM - 9:45 AM	P3 10:05 AM - 10:55 AM	P4 11:00 AM - 11:50 AM	P5 12:25 PM - 1:15 PM	P6 1:20 PM - 2:10 PM	P7 2:15 PM - 3:00 PM
Health/Careers/F/38	Health/Careers/F/27				
Health/Careers/S/38	Health/Careers/S/27				
ing Fund/Y/20	PE 9/Y/11	SE Collaboratio/Y/0	Algebra A/Y/13		Resource/Y/0
l Study/Y/0	Ind Study/Y/0	Ind Study/Y/0	Algebra B/Y/0		
	Algebra A/Y/2		Ind Study/Y/0		

ilder Find Best Pd Rejected Courses Crs Changes Rejected Stus **Schedule Students** Backup/Restore Print Exit

- Pre-scheduled (locked) sections stay
- Courses with fewer available sections are scheduled first (in other words, singletons first, then doubletons, etc.)
- Sections with most empty seats are tried first; it tries to keep an empty seat in every section
 - So different maxes might cause effects you don't expect
- Core classes are scheduled before non-core classes
 - NCLB Core (CRS.NCC) and N/H (CRS.NA) fields



Do you need to add sections? Check the Scheduling Course Request Analysis report

- Quickly see Seats Short: not enough sections for the number of students requesting the Course

2022-2023		Flex Soaring Eagle High School					11/1/2022		
		COURSE REQUEST ANALYSIS					Page 1		
Course Number and Title		Total Requests	Total Seats	Seats Short	Total Sections	Average Size	Requests / Section	Actual Rejects	% Rejects
0090	Athletics	23	835		2	418	12		
0095	Study Skills	70	64	6	2	32	35	6	8.6%
0101	Art I	111	114		3	38	37		
0104	Ceramics I	162	180		5	36	32		
0105	Ceramics II	20	32		5	6	4		
0109	Lab Asst Art	0	10		5	2	0		
0112	Lab Asst Cer	1	10		5	2	0		
0115	Art II	37	32	5	1	32	37	5	13.5%
0117	Beg Dance	0	50		2	25	0		
0118	IB Vis Arts SL	11	30		1	30	11	4	36.4%
0119	IB Vis Art HL I	0	30		1	30	0		
0122	IB Vis Art HL I	14	30		1	30	14		
0123	IB Vis ArtsHLII	3	8		1	8	3		
0128	Intermed Dance	0	0		1	0	0		

↑ Not enough seats: Need to increase section maxes or add section or change students' Course Requests
↓
↑ Seats exist, so check the student's Course Requests page to see reject reason before moving section/adding section. However, a high % Rejects might indicate that the section could be moved.

Do you need to move sections? Check the Scheduling Class Load Analysis by Course and Period report

- For each Course, Dev reflects the difference between the Total in one section vs. the Class Average of all the sections
- Over the Class Average (too full) and under the Class Average (not full enough) are both issues to solve
- We want balance: each section's Total is equal to the Class Average (or near the Class Average)
- Look at > 5 Dev (deviation) if not Flex. Add a section? Move a section?
- Don't move the singletons or doubletons!

10/31/2023
10:12 AM

Flex Soaring Eagle High School

2023-2024
CLASS LOAD ANALYSIS BY COURSE AND PERIOD
Page 1

Scheduling Using Next Year's Grade Levels!

Sec#	Period	Sm	Calendar	Crs ID	Course Title	Primary Teacher	Rm	Crd	Sch Grp	Crs Grp	Tm Nm	Sm Grp	Gn Range	Max	Total	Boys	Girls	TOG	9	10	11	12 Left	Dev
3021	P0	Y	P0	0428	Acc Spanish I	894701 Brewer, .	BC2	5.0			0		9 10	36	31	16	15	0	30	1	0	0 5	0.0
3022	P3	Y	P3	0428	Acc Spanish I	894701 Brewer, .	BC2	5.0			0		9 10	36	31	14	17	0	31	0	0	0 5	0.0
452	P4	Y	P4	0428	Acc Spanish I	894701 Brewer, .	BC2	5.0			0		9 12	36	31	17	14	0	29	2	0	0 5	0.0
									Class Average: 31.0				Total:	108	93	47	46	0	90	3	0	0 15	0.0

Sec#	Period	Sm	Calendar	Crs ID	Course Title	Primary Teacher	Rm	Crd	Sch Grp	Crs Grp	Tm Nm	Sm Grp	Gn Range	Max	Total	Boys	Girls	TOG	9	10	11	12 Left	Dev
617	P1	Y	P1	0725	Hon World Hst	894605 Barrera, Z2	Z2	5.0			0		10 12	38	5	1	4	0	0	5	0	0 33	22.3 +
2970	P2	Y	P2	0725	Hon World Hst	894800 Luna, L	D5	5.0			0		9 12	38	35	16	19	0	30	5	0	0 3	7.7 +
636	P3	Y	P3	0725	Hon World Hst	894605 Barrera, Z2	Z2	5.0			0		9 10	38	34	16	18	0	29	5	0	0 4	6.7 +
2705	P4	Y	P4	0725	Hon World Hst	894605 Barrera, Z2	Z2	5.0			0		9 10	38	35	17	18	0	30	5	0	0 3	7.7 +
									Class Average: 27.3				Total:	152	109	50	59	0	89	20	0	0 43	11.1

Do you need to move sections? Check the Scheduling Class Load Averages report

- To print the Seat Counts, choose these Options:
 - Skip Inactive Students
 - Display Only Totals
- Total requests by Grade Level divided by the total number of sections.
- Seat Count: the Total number of seats per period by Grade Level, if each SMS section contained the average number of students per Course
- Compare Average Requests per Section to the Total Students
 - Much higher? Seats (sections) for that Grade Level could potentially be moved to another period
 - Much lower? Seats for that Grade Level are needed in that period
- Don't move singletons or doubletons!

Print Scheduling Class Load Averages Report Options

Report Format: PDF

Report Delivery: None

Select Term to Print

F - (includes: F, Y)

S - (includes: S, Y)

Y - (includes: F, S, Y)

Select Print Options

Skip Inactive Students

Skip Teacher Aides

Skip Classes With no Requests

Display Only Totals

Flex Soaring Eagle High School											11/1/2022				
2022-2023 Class Load Averages by Term, Period and Grade - Term: F											Page: 1				
Period	Sec#	Sm	Cr	ID	Course Title	Primary Teacher	Room	Total Seats	Total Requests	Total Sections	AVERAGE Requests per Section				Actual Sched
											Total	Male	Female	O-GN	
Term: F Period P0 Totals:							778	381	387	0	247	213	189	125	831
Term: F Period P1 Totals:							1858	880	965	0	442	437	569	398	1789
Term: F Period P2 Totals:							1593	792	788	0	358	450	432	341	1662
Term: F Period P3 Totals:							1710	814	886	1	513	530	372	285	1637
Term: F Period P4 Totals:							1943	985	952	0	488	493	541	410	1794
Term: F Period P5 Totals:							1625	840	775	1	455	558	299	298	1605
Term: F Period P6 Totals:							1330	632	689	1	293	448	351	232	1362
Term: F Period P7 Totals:							430	204	211	1	91	112	103	122	406
Term: F Period P8 Totals:							0	0	0	0	0	0	0	0	0
Term: F Period P9 Totals:							0	0	0	0	0	0	0	0	0
Total Students including Active and Pre-Enrolled							1976	980	995	1	497	540	489	450	

1. Add/move sections
2. Run the scheduler
3. Run reports

Repeat steps 1 – 3 until:

- Students are 100% scheduled, or
- You have no other possibilities for adding/moving sections, or
- You have run out of time



At some point, you are going to stop running the Scheduler:

- After you stop mass scheduling:
 - Run the Scheduling Optimizer
 - Hand schedule students on the Course Requests page

Scheduling Optimizer

Optimizer Status	
Current Student:	Julien Todd Cooley (1879)
Current Course:	US History Cp (0702)
Total Students Scheduled by Optimizer:	3
Total Students Impossible to Schedule:	36

[Optimize Schedules](#) [Pause](#)

 13%

 Processing... 52 / 395 = 13%

Hand Scheduling on Course Requests page: Old Edit View

- **Display Options:** view Flex Periods horizontally or vertically
- **Reject** column: why the Scheduler didn't put the student into a section
- **Temporary Lock:**
 - Apply using button under **All**
 - Display as **Locked** in **Reject** column
 - Can be mass cleared on **Schedule All Students** page
- **PermLk** set when editing the Course Request
 - Display as ***Permanent Lock*** in **Reject** column
 - More/different **PermLk** codes can be added on **Update Code Table** page for SSS.PL field
 - Can't be mass cleared on **Schedule All Students** page
- Alternate Course Requests can be added and associated with primary Course Requests
- Scheduling Exclusions for Student, Teacher, or Period
- Student can be added to the Wait List for a full section

⚠ Scheduling Using Next Year's Grade Levels!

Course Request

Counselor: 716 Quinn | Time Range: | Schedule Group: No Group

Display Options

Show Available Periods

Display Flex Period Times

From SSS.PL code values

Crs ID	Course Title	Time Range									Prf Teacher Name	Meets	AltCrs	Sec#	Per Trm	More Class Info	Reject	PermLK	ALL
		1	2	3	4	5	6	7	8	9									
0010	PE 9	○	○	○	○	○	○	○	○	○	0		0				Grade Range		
0208	Bus Tech Core										0		0				Invalid Crs		
0591	Adv Choral Ens						⊗	⊗			0		0				Full Classes		
0775	IB TheoryKnow	○									0		0				STU Excls Err		
0714	Economics Cp	○	○	○	✓	○	○	○	○	○	0	Benson, A	MTWRF	0	1029	4	Y		
0427	IB Span HL 2										0	Trujillo, Z	MTWRF	0	1013	7	Y	*LOCKED*	
0064	Wm Water Polo	○									0	Crawford, K	MTWRF	0	1007	8	Y	*Permanent Lock*	S - Scheduling Need
1500	Tchr Aide	⊗	⊗	⊗	⊗	⊗	⊗	⊗	⊗	⊗	0	Chang, I	MTWRF	0	1036	9	Y	Locked	

Alternate Course Requests

Course	Date Added
<input type="button" value="Add New Record"/>	

Scheduling Exclusions

School	Type	Exclusion
894	Student	89402054 - Acosta, Libby Myla
894	Student	89402371 - Acevedo, Milagros Sandra
894	Teacher	894809 - Cooper, Tomas

The Scheduler will honor Scheduling Exclusions

Or use Scheduling Reject Analysis Listing report

Only this student

Temporary lock

Hand Scheduling on Course Requests page: New Edit View

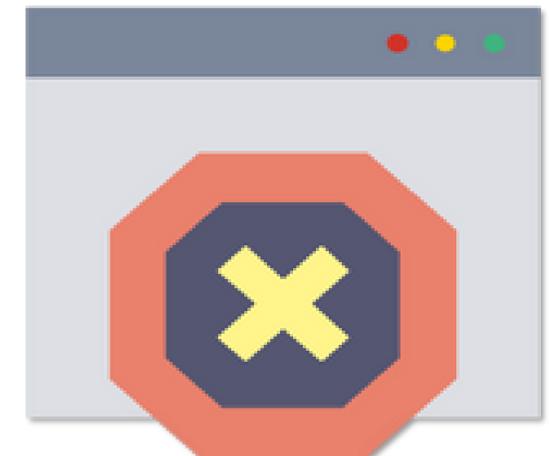
- **Display Options:** view Flex Periods horizontally or vertically
- **Reject column:** why the Scheduler didn't put the student into the section
- **Temporary Lock:**
 - Apply using button under **All**
 - Display as **Locked** in **Reject** column
 - Can be mass cleared on **Schedule All Students** page
- **PermLk** set when editing the Course Request
 - Display as ***Permanent Lock*** in **Reject** column
 - More/different **PermLk** values can be added on **Update Code Table** page for SSS.PL field
 - Can't be mass cleared on **Schedule All Students** page
- Alternate Course Requests can be added and associated with primary Course Requests
- Scheduling Exclusions for Student, Teacher, or Period

The screenshot shows the 'Course Request' page in 'New Edit View'. At the top, there are filters for Counselor (723, Robles), Time Range, and Schedule Group (No Group). A 'Display Options' box is highlighted, containing a checked 'Show Available Periods' option and an 'Old Edit View' link. A red box points to the 'PermLk' column header with the text: 'Add new PermLk codes on the Update Code Table page for the SSS.PL field'. The main table lists course requests with columns for Crs ID, Course Title, time slots (P0-P9M), Prf, Teacher Name, Meets, AltCrs, Sec#, Per, Trm, More Class Info, Reject, and PermLk. The 'Reject' column contains various error codes like 'Grade Range', 'STU Excls Err', 'Conflict', 'Full Classes', 'Invalid Crs', '*Permanent Lock*', and 'Locked'. A 'Permanent Lock' box points to the '*Permanent Lock*' code, and a 'Temporary Lock' box points to the 'Locked' code. Below the table, there are buttons for 'Reschedule', 'Previous Rejected Student', and 'Next Rejected Student'. A 'Reschedule' box points to the 'Reschedule' button with the text: 'Only this student'. A 'Temporary Lock' box points to the 'Next Rejected Student' button with the text: 'Use these buttons to advance through students who need to have their schedules adjusted. Alternatively, use the Scheduling Reject Analysis Listing report.' On the left, there are sections for 'Alternate Course Requests' (with a note: 'If Alternate Course Requests exist, check Schedule Alternates and Reschedule button to see if the Alternate Course Requests will schedule.'), 'Scheduling Exclusions' (with a note: 'Stu Excls Err above is related to this student.'), and 'Wait List' (with a note: 'Student has been added to a Wait List for a full section.').

Course Requests page: guide to Reject reasons

- **Conflict** could be one of the following:
 - A scheduled section is preventing sections of other Courses from being scheduled in the same Flex Period.
 - Too many Course Requests exist for the number of periods or Flex Periods available.
 - A Time Range or Period Range restriction is preventing available sections from being scheduled.
- **Full Classes:** All sections of the Course are full.
- **Grade Range:** All sections of the Course are set to a Grade Range that does not include the student's Next Grade.
- **Invalid Crs:**
 - No sections of the Course are offered.
 - In a Flex school, sections may be offered but are missing their Flex Period or Class Calendar.
- **StuGrp Restrict:** The Scheduling Group code for the sections does not match the student's Scheduling Group code (SMS.SG <> STU.SG).
- **Tchr Pref Err:** The Pref value does not match any section's Teacher (SSS.TN <> SMS.TN for traditional scheduling; SSS.PS <> SSM.ID for Flex scheduling).
- **Sex Restriction:** All sections of the Course are restricted to a different Gender (SMS.GN <> STU.GN).
- **Track Restrict:** All sections of the Course are restricted to other Tracks (SMS.TR <> STU.TR).
- **ALTERNATE:** An alternate Course was scheduled in place of the original Course Request.
- **Locked:** The section is scheduled and temporary locked.
- ***Permanent Lock*:** The section is scheduled and perm locked.
- **PD Excls Err:** A period scheduling exclusion is preventing a section from being scheduled.
- **Tchr Excls Err:** A teacher scheduling exclusion is preventing a section from being scheduled.
- **STU Excls Err:** A student scheduling exclusion is preventing a section from being scheduled.

Reject
Grade Range
Conflict
Invalid Crs



SMS Board/Flex SMS Board helpful buttons after you've scheduled students:

Rejected Courses button:

- Which Courses have rejects and why
- Use the SMS and STU buttons to drill down to sections or students

Rejected Courses Crs Changes Rejected Stus

CN	Course Title	SMS	Total	STU	Conflict	Full	GR	TE	GN	TR	StuGrp	Invalid
0011	PE	<input type="checkbox"/>	3	<input type="checkbox"/>	2	0	1	0	0	0	0	0
0012	Weight Trng	<input type="checkbox"/>	1	<input type="checkbox"/>	1	0	0	0	0	0	0	0
0015	Marching PE	<input type="checkbox"/>	5	<input type="checkbox"/>	5	0	0	0	0	0	0	0
0017	Beg Dance	<input type="checkbox"/>	4	<input type="checkbox"/>	4	0	0	0	0	0	0	0
0018	Inter Dance	<input type="checkbox"/>	4	<input type="checkbox"/>	4	0	0	0	0	0	0	0
0019	Adv Dance	<input type="checkbox"/>	2	<input type="checkbox"/>	2	0	0	0	0	0	0	0

Crs Changes button:

- See all sections at a glance
- Change key information for all sections or selected sections

Scheduling Master Schedule - Course Change (0353 - Lib Trng I)

SE #	PD	BL	SM	Days	Teacher	RM	GN	LO	HI	TR	SchGP	TmCrsGp	TM	SemGP	MX	TS	Left
1042	0	1	Y	MTWTF	635 - Gonzalez	LIB		10	12				0		0	0	0
87	1	1	Y	MTWTF	635 - Gonzalez	LIB		10	12				0		2	0	2
240	2	1	Y	MTWTF	635 - Gonzalez	LIB		10	12				0		2	1	1
394	3	1	Y	MTWTF	635 - Gonzalez	LIB		10	12				0		2	1	1
543	4	1	Y	MTWTF	635 - Gonzalez	LIB		10	12				0		2	2	0
780	5	1	Y	MTWTF	635 - Gonzalez	LIB		10	12				0		2	1	1
835	6	1	Y	MTWTF	635 - Gonzalez	LIB		10	12				0		2	2	0

PD BL SM TE RM GN LO HI TR - No... TM - N... MX **Change All**

* Changing the Teacher will change the Room and Max values based on the Teacher (TCH) values.

Rejected Stus button:

- Same as STU column button on Rejected Courses
- Students with rejects
- Can remove the Course Request
- Probably easier to manage these on their Course Requests page

Scheduling Master Schedule - Rejected Students (0018 - Inter Dance)

Student #	Last Name	First Name	G...	NG	TR	LO	HI	Reason	
1219	Huguez	Marcella	F	11		0	9	Conflict	<input type="button" value="x remove"/>
1474	Lopez	Cory	M	12		0	9	Conflict	<input type="button" value="x remove"/>
1755	Moon	Rebecca	F	12		0	9	Conflict	<input type="button" value="x remove"/>
2706	Watson	Marbella	F	10		0	9	Conflict	<input type="button" value="x remove"/>

Mass Move/Copy Students on the Scheduling Master page

1. Select the section students will be moved/copied from.
2. Add the section number the students will be moved/copied into the **New Section** field on the **Students** tab near the bottom of the page.
3. If a subset of students should be moved/copied, tag them (click on the student names).
4. Press appropriate button based on whether all or tagged students should be moved or copied.

Scheduling Master **1**

89

Section	CrsID	Crs Title
89	0315	Hon Eng 10 CP

Scheduling Master Schedule

Section	Sem	Flex Period
89	Y	P4-11:00 AM to 11:50

Students

Stu#	Last Name	First Name	Gender	NG	Prg	TG	Track	LngFlu	Lock
1522	Dunn	Alaina	F	10				E	
1055	Farrell	Caleb	M	10				E	
308	Glenn	Fatima	F	10				E	
1208	Hale	Scarlet	F	10				E	
203	Henderson	Norah	F	10				E	
1957	Hull	Kylee	F	10				E	
2136	Lee	Kimora	F	10				E	
1030	Lindsey	Heath	M	10				E	

3

Move students to another class

2

4

 Scheduling Using Next Year's Grade Levels!

 Note: Click on students to tag and untag them.

Wait Lists on the Scheduling Master page

- Scheduling Setup: Allow Wait Lists
- Scheduling Master Schedule: section must be full
- Add Student to Wait List for the section
- Change Priority Order of the students
- Delete students from the Wait List for a section

Students	Wait List								
Add Student to Wait List	Change Priority Order								
Stu ID	Last Name	First Name	Prg	Grade	Next Grade	Track	LngFlu	Status	Date Added
 89400001	Abbott	Alex		12	13		L		11/1/2022 2:50:01 PM
 89400667	Duke	James		10	11		I		11/1/2022 2:50:29 PM

Scheduling reports: Scheduling Reject Analysis Listing

- All students with rejected Course Requests
- Look for patterns

Flex		Flex Soaring Eagle High School			11/2/2022
2022-2023		SCHEDULING REJECT ANALYSIS LISTING			Page 1
Student Name	STUID	Time Range	CRS#	Course Title	Rejects
Grade: 8					
Anthony, Nick	89400105	All Day	0095	Study Skills	F *** Full Classes ***
Ayers, Danielle	89400702	All Day	0011	PE	G *** Grade Range ***
			0961	Algebra A	I *** Invalid Course ***
			0017	Beg Dance	C *** Period Conflict ***
Bush, Jay	89400013	All Day	0010	PE 9	C *** Period Conflict ***

Student Locator Cards

- Print for SMS/SSS (or wait to print them from the MST/SEC)
- Schedule to print out for students
- Lots of options for what is included and how it prints

Student Name				Student ID	Grade		
Acevedo, Milagros S				89402371	11		
School				Enter Date			
Flex Flex Soaring Eagle High School				08/17/2018			
Class Schedule				Counselor: Robles			
Per	SM	Calendar	Sec#	Course ID	Course Title	Teacher	Room
P0	Y	P0	2703	0702	US History Cp	Hudson, C	CD2
P1	Y	P1	1994	0610	Adv Algebra Cp	Garrett, S	
P2	Y	P2	316	0708	Psychology Cp	Roberts, V	R2
P3	Y	P3	1844	0303	English 11 CP	Suarez, K	CD1
P4	F	P4	1353	0225	Acct & Fin Mgn	Francis, S	B7
P4	S	P4	2944	0226	Mrkt & Advertis	Francis, S	B7
P5	F	P5	3011	0229	PersonalFinance	Hamilton, R	T1
					Date		
Back to School Night Thursday Sep 8 at 7:00 pm					11/02/2022		

Copy Scheduling Results to SEC & MST

- After New Year Rollover and after the Scheduling Master Schedule is finalized, but before school starts.
- Copies the Scheduling Master Schedule to the Master Schedule; copies students' Course Requests' scheduled sections to Classes.
- **Check here to continue:** you must acknowledge the warning before the rest of the options are displayed
- Got inactive sections in the SMS, but you don't know why? Run this query:

```
LIST SMS CRS SMS.SE CRS.CN CRS.CO SMS.STG SMS.STG? IF SMS.STG > ''
```

- **After running this process, scheduling is over, so:**
 - Use Master Schedule page (not Scheduling Master page) to modify sections.
 - Use Classes (not Course Requests) to modify students' schedules.
 - The Flex SMS Board/SMS Board will be inactive (use the Master Schedule page instead).
 - Be aware that many reports have scheduling (SMS/SSS) versions and Master Schedule versions (MST/SEC). Choose the correct report for your needs.
 - If you are concerned about whether parents/students can see student schedules, you may need to take steps to prevent it. See the article Hiding Gradebook, Class and Teacher Information Before the First Day of School: <https://support.aeries.com/support/solutions/articles/14000118198-hiding-gradebook-class-and-teacher-information-before-the-first-day-of-school> (p.s. don't forget 3rd party integrations!)

Copy Scheduling Results to SEC & MST

- * Warning: This function will:**
- 1) Delete all current student classes.
 - 2) Copy scheduled classes to student current classes.
 - 3) Copy scheduling master schedule to master schedule.
 - 4) Set scheduling tables to inactive.

The MST and SEC tables contain last year's data. This process will delete that data and replace it with the scheduling data from the SMS and SSS tables.

Check here to continue

Options

Clear student print tags (STU.PT)

STU.PT records if the Locator Card was printed from the SMS. If you want to print the "Changes Only" option for Locator Cards from the MST, do not clear.

Do Not Reactivate Sections

Reactivate All Sections

Activate Sections with Select Tags

If the SMS contains inactive sections, specify whether to reactivate them.

Select which terms to copy:

Year Long Classes

Fall

First Quarter

Second Quarter

Spring

Third Quarter

Fourth Quarter

Select all Terms.

What is the Course Attendance Start Date for new sections added to students' class schedules?

08/24/2022

Set the Course Attendance Start Date to the first day of school.

Run Process

Epilogue: next year, do you have a LOT of mid-year scheduling changes?

Issue: lots of changes to students' schedules, all starting on the first day of the Spring Term, in Year long Courses/sections. The regular process for a schedule change is to use the Classes page. But there are hundreds . . .

Problem: if you make changes for future dates in Classes (SEC):

- The Classes page shows the change immediately (CAR will be correct, though)
- GRD initialization after these changes will reflect the sections on Classes (SEC), so students may be included/not included incorrectly
- In Gradebook, students will show up to be added to sections on Classes (SEC)

What are your options?



Epilogue: next year, do you have a LOT of mid-year scheduling changes?

Option	Pros	Cons
Wait until the last day of the Fall Term to make all those changes on Classes page	Simple but effective	<ul style="list-style-type: none"> Potentially too many changes for one day No one wants to do this during their winter break
Wait until GRD has been initialized at the end of the Fall Term and make changes on Classes (but warn everyone that Classes may be incorrect until the Spring Term starts)		Confusing for the people who use Classes to find the student
Do mid-year scheduling in SSS and SMS ★	More time to make the changes	<ul style="list-style-type: none"> Maybe scary the first time? May need training?
Change all Courses to Semester long and use Fall/Spring pairs of sections for all Courses		<ul style="list-style-type: none"> Big project; You are doubling every schedule change and many schedule-related areas Needs to be in place before school year starts

Where to go for more information:

Student Scheduling for Next Year category on support.aeries.com:

<https://support.aeries.com/support/solutions/folders/14000116178>

Secondary Scheduling Videos (Flex and Non-Flex):

<https://support.aeries.com/support/solutions/folders/14000128208>

New! Flex Scheduling Process Flow Chart

<https://support.aeries.com/support/solutions/articles/14000157283-flex-scheduling-flow-chart>

New! Flex Scheduling Process Guide and Checklist

<https://support.aeries.com/support/solutions/articles/14000156351-flex-scheduling-process-guide-and-checklist>



We value your feedback:



Training: Master Schedule
Trainer: Carole Williams



<https://survey.alchemer.com/s3/8287619/Aeries-Training-Survey>