STIOffice – Scheduling

Overview

This document is intended to guide users through the process of scheduling students for the next school year while the current year is still in progress. The steps that will be discussed are as follows:

- Enter incoming students into database.
- Decide what courses to offer.
- Set up for the New Year.
- Enter student course requests:
  - Scan student requests.
  - Use request models.
  - Add groups of students to a course.
  - Post Requests from Home/Home+
  - Manual Entry
- Print Request Reports.
- Design the Master Schedule:
  - Manual Entry
  - Master Schedule Builder
- Determine conflicts:
  - Run various reports.
  - Use **Schedule** button in **Request Maintenance**.
- Run the automated scheduler.
- Schedule students into study halls.
- Print reports:
  - Student Schedules
  - Teacher Schedules
  - Course Rosters
  - Master Schedule Summary
  - Other reports as needed.

- Replace the current schedule with the new year schedule during or after Rollover.

Basic Information

New Year Scheduling is performed under **Courses** | **New Year Scheduling**.

A different color may be assigned to all New Year screen backgrounds. To change the background color, go to **Utilities** | **System Utilities** | **INI File Settings** and check the *Color on New Year* box, then click the **Ellipsis** button and choose a color. This is a *per workstation* feature.

Add Incoming Students for Scheduling - Importing Students from Feeder School

This procedure is used to move groups of student records from one school to another. This would be performed, for example, when a high school imports records from surrounding middle schools for students expected to attend the high school next year. This will eliminate the need to re-enter student data and will also streamline the process of creating schedules for the coming year. This procedure may be completed using either STIDistrict Enrollment or STIOffice.

Using STIDistrict Enrollment to Import From a Feeder School

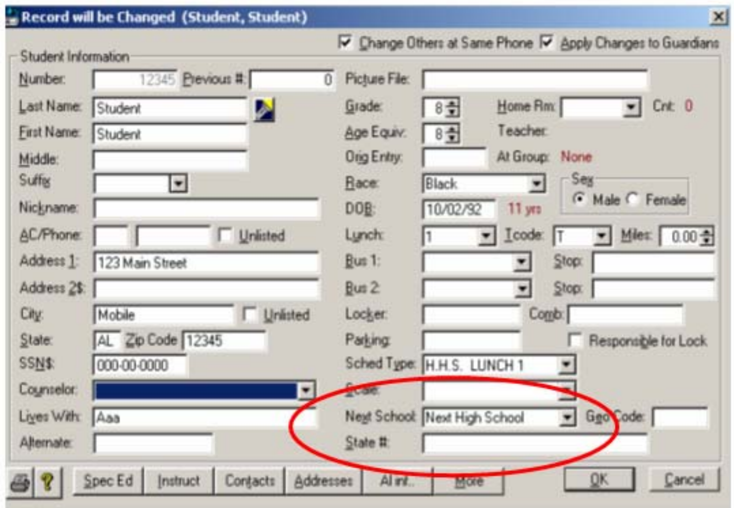
This feature will only be available during the time period configured in the STIDistrict workstation under the *Enrollment Settings* screen. Data to be moved from the current school to the next school is also defined using this screen.

Using STIDistrict Enrollment allows the school to import all incoming students within the district at once. Records will be imported only for students who have the *Next School* value populated within their demographic record in STIOffice. Only those students whose *Next School* value is equal to the importing school's *School Code* (as it appears in the System File in STIOffice) will be imported into the school that runs the import. To populate this field in a student record, a list of school codes must first be created.

Creating the School Codes List

- In STIOffice, select **Utilities | Code Maintenance | Most Codes**.
- Bullet *Next School*.
- Click on **Insert** to create a new code.
- Enter the *School Code* and then type the name of the school.
- Click **OK** to save. Repeat the process until all schools in the district are listed.

Setting the Next School Value in the Student Demographic Record



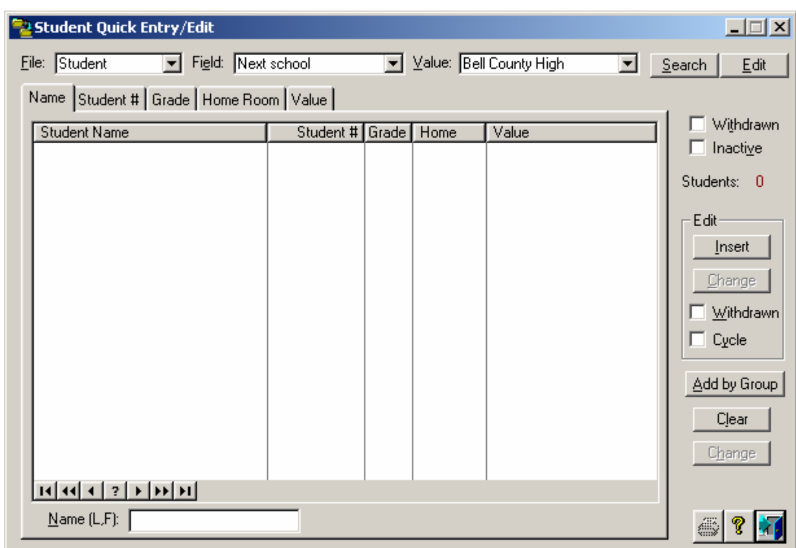
To change the *Next School* field for individual students, perform the following steps:

- Select **Students | Add/Edit Student Information** and double-click on the student (or highlight the student and click **Change**). Alternately, you may *Lookup* the student in **Students | Desktop**. Click **Select** to open the student record, then click the **Student** button.
- Use the *Next School* drop- list to choose the school the student will attend.

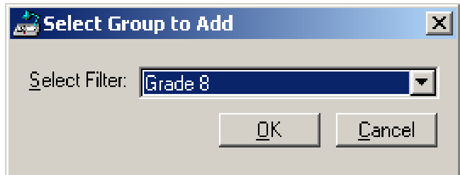
To change the *Next School* field for a group of students at once, perform the following steps:

- Select **Students | Quick Entry/Edit**.

Note: For detailed instructions on how to use the **Quick Entry/Edit** feature to change other data fields, refer to the *STIOffice – Quick Entry Edit* Quick Reference Guide on the Documentation page of the STI Customer Support Site at www.sti-k12.com.



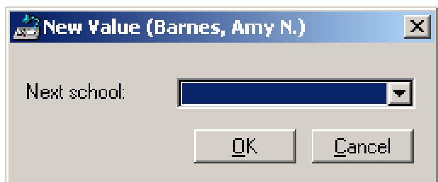
- Click the *File* drop-list button and select *Student*.
- Click the *Field* drop-list button and select *Next School*.
- Click the *Value* drop-list button and choose the next school that will be attended by the majority of students.
- Click the **Search** button. The utility will draw all students whose *Next School* value is as selected.
- Click the **Add by Group** button.



- Select the outgoing grade level and click **OK**.

To change an individual student's *Next School* field, follow these steps:

- Highlight the student and click the upper **Change** button. There are two **Change** buttons; the lower button is used to change <u>all</u> listed students to the same value.



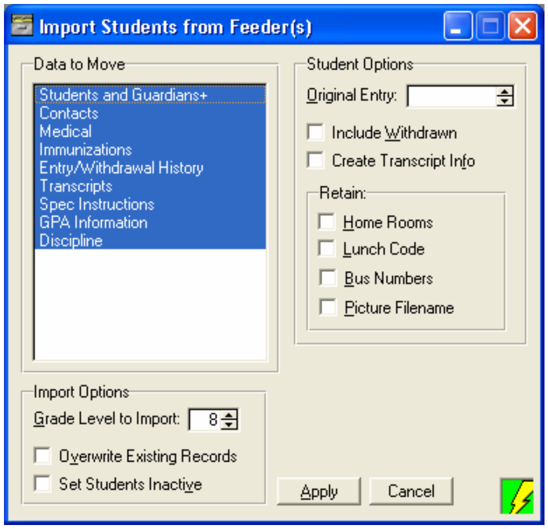
- Enter the value for the selected student
- Click **OK**. The student will disappear from the screen.
- Repeat these steps for all students until all *Next School* values are correct.

Note: Clicking the **Edit** button will allow you to view all the students' values.

Importing Incoming Students via STIDistrict Enrollment

After the *Next School* has been entered for all students who are to be imported, perform an upload of the data to STIDistrict. Once the data has been imported into the STIDistrict database, students may be imported by other schools.

- Open the STIDistrict Enrollment program at the school performing the import.
- Select **File | Import Students from Feeder(s)** or click once on the  button on the toolbar.



- Highlight the data to import in the *Data to Move* window. The school will be limited to the data elements defined in the STIDistrict Workstation setup.
- The *Original Entry* field can be used to enter a date value that will be displayed in the *Original Entry* date as entered in student demographic records. Leaving this field blank will allow the value set in the feeder school to be pulled in as the original entry date; this will track the original entry into the state rather than the school.

> Note: This date is not related to the students' current year enrollment. Rather, this date is used to keep track of the students' initial enrollment.

- Select *the Grade Level to Import*.
- Use the checkboxes to select any of the following:
  - **Overwrite Existing Records**: Check this box to replace existing student data with new data. This will only update the data selected in the *Data to Move* window.
  - **Set Students Inactive**: Check this box to import the new students in as *Inactive*. (Students set inactive cannot be scheduled by group via **Request Maintenance**. Students may be separated by the use of filters instead of being imported as inactive.)
  - **Include Withdrawn**: Check this box to import all students with the corresponding *Next School* value, and the grade level selected, regardless of their current enrollment status.
  - **Create Transcript Info**: Check this box to import the students' transcripts. (The transcript terms must be set up identically in both schools in order for this information to display correctly.)
- *Retain* section:
  - **Home Rooms**: Check this box to import the students' home room information.
  - **Lunch Code**: Check this box to import the students' lunch code setting.
  - **Bus Numbers**: Check this box to import the students' bus numbers.
  - **Picture Filename**: Check this box to import the students' picture file name (not the actual picture file itself).
  - Click the **Apply** button. The students will now be in your database.

Using STIOffice to Import From a Feeder School

This may be done on a student by student basis in **Students | Add/Edit Student Information**, or the user may import multiple students at once from the feeder school(s).

- Have the feeder school(s) export outgoing students. To do this, go to **Utilities | Students | Export Outgoing** and do the following:
  - Select filter for outgoing class level or click on **Select Student** button to manually select students to be exported. Check *Include Withdrawn* if applicable.
  - Enter the datapath for export. For example: *A:*, to send to the floppy drive.
  - Under *Export Options*, select **Geo Code** and/or **Next School** from the drop-down lists if applicable. Check *Compress All Files into One* to create just one file. If this box is not checked, multiple files will be created.
  - Under *Student Data to Export*, check the appropriate boxes. Make a note of the boxes that are selected during the export. Share this information with the receiving school.
  - Click **Apply**.
- Import incoming students from each feeder school. Students may be imported a second time at the end of the school year to get their full information, so this import might transfer only Student and Guardian+ information. To do this, go to **Utilities | Students | Import Incoming** and do the following:
  - Under *Student Data to Import*, check the appropriate boxes. The exporting school should furnish a list of what was exported.
  - Under *Import Options*, enter the path from which to import (for example, A:\ to pull data from the floppy drive) and check the appropriate boxes:
    - Check *Import All Files in Path* if the exporting school did not compress files into one. If selected, the Filter Options below becomes active. User may select to import students based on *GEO Code*, *User Field* or *Next School*.
    - Check *Import File Compressed* if exporting school compressed files into one.
    - Check *Rollover Has Been Performed* if this school has completed Rollover and the exporting school has not. This option will increment the incoming students only.
    - Check *Overwrite Existing Records* if this is not the first time the import has been performed.
    - Check *Set Students Inactive* to set all incoming students inactive.
    - Check *Print Results* for a printed report of all students imported.
  - Under *Student Options*,

    Enter the Original Entry Date if desired. Check *Include Withdrawn* if desired.

    Under *Retain*, check the appropriate boxes:

      - Home Rooms
      - Lunch Code
      - Bus Numbers
      - Picture Filename

    Check *Create Transcript Info* and select the school if desired.
  - Click **Apply**.

Build 8th Grade and/or Scheduling QBE Filter

To do this, go to **Utilities | Student QBE Maintenance** and do the following:

- For 8th grade filter:
  - Click **Insert**.
  - Enter description.
  - Set *Filter Type* to *Advanced*.
  - Click the *Adv Student* tab.
  - Select the file of Student.
  - Select the field of Grade Level.
  - Select the operator of Equal To.
  - Enter a value of 8.
  - Click the ellipsis button (with three dots) to add the information to the filter expression box below.
  - Click **Test**.
  - Click **OK** to save.
- For a grade 8-11 filter, including inactives and excluding withdrawn students:
  - Click **Insert**.
  - Enter description.
  - Set *Filter Type* to *Advanced*.
  - Click the *Adv Student* tab.
  - Enter the following in the student filter expression box:

  (stu:GRADE > 7 and stu:GRADE < 12) and (stu:INACTIVE = 0 or stu:INACTIVE = 3) and stu:WD = 0

  - Click **Test**.
  - Click **OK** to save the filter.

Update Room File

To do this, go to **Courses | Room File** and do the following:

- Insert any new rooms.
- Delete any rooms that are no longer being used.
- Change location or description as needed.

Update Teacher information

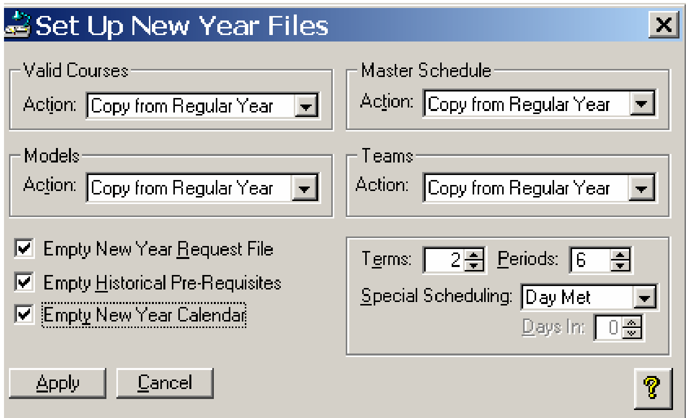
To do this, go to **Teachers | Add/Edit Teacher Information** or **Teacher Desktop** and do the following:

- Add new teachers.
- Delete any teachers who have moved from your school (they cannot be attached to any courses or home rooms).
- Change any current information, such as addresses, phone numbers, home rooms, room numbers, user groups and passwords.

o Go to **Teachers | User Access | Assign Users to Groups** and verify that teachers have been assigned to the proper user groups.

Set up New Year

Go to **Courses | New Year Scheduling | Set Up New Year** and perform the steps listed below.



- In the drop-down lists onscreen, select, select one of the following actions for *Valid Courses*, *Master Schedule*, *Models* and *Teams*:
  - o **<u>Copy from Regular Year</u>**: Uses the same valid courses as the current year.
  - o **<u>Create Empty Copy</u>**: Erases valid courses. New valid courses must be created.
  - o **<u>No Action</u>**: The valid courses in the New Year Valid Course File will be used.
- **<u>Empty New Year Request File</u>**: Check this box if you want to delete the students' requests from the last year. <u>This option is recommended</u>.
- **<u>Empty Historical Pre-requisites</u>**: Check this box to clear any historical pre-requisite files.
- **<u>Empty New Year Calendar</u>**: Check this box to clear out the New Year calendar.
- Choose the correct number of *Terms* and *Periods*, and select the type of *Special Scheduling*.
  - o Leave blank if traditional scheduling is used (all classes meet Monday through Friday).
  - o **<u>Day Met</u>**: Classes meet on specific days of the week. This could include a class that meets on Fridays only; another class that meets Monday, Tuesday, Friday; or A/B scheduling.
  - o **<u>Cycle</u>**: Classes cycle three or more days. For example, Period 1 Class A meets for three days; then Class B meets for three days.

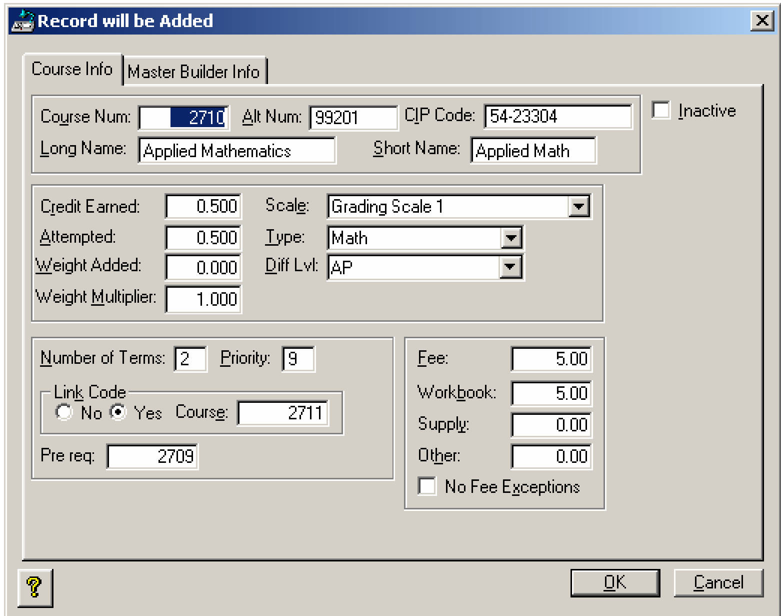
Validate Schedule Counts

- Select **Utilities | System Utilities | Validate Schedule Counts**.
- This function will update the seats taken for each class. Select *Regular* or *New Year* as appropriate. This utility cannot be run too many times, so any time schedules are run, the schedule counts may be validated again.

Set Up Valid Courses

Courses | New Year Scheduling | Valid Courses

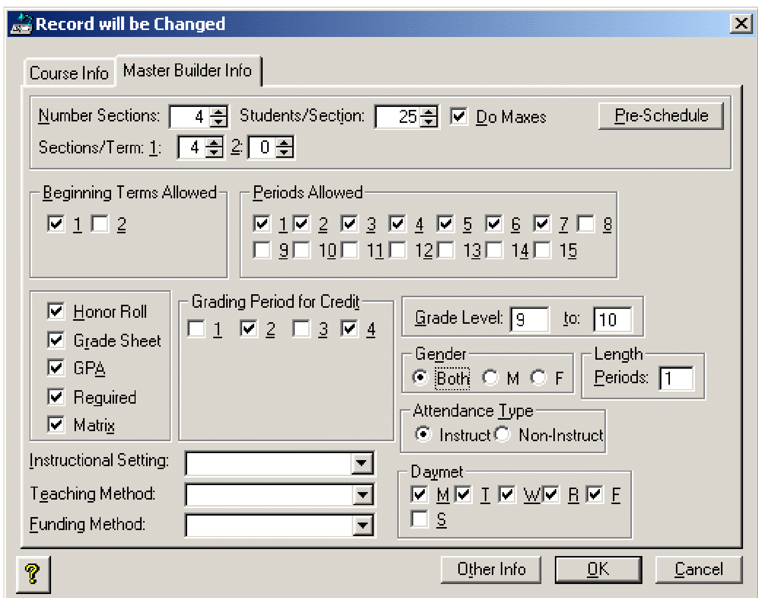
- Click **Insert** to add a new valid course.



- Select the *Course Info* tab.
  - o **Course Number**: This cannot be alphabetical and cannot include any decimals.
  - o **Alternate Number**: Not required. May be alphabetical or numeric.
  - o **CIP Code**: Not required. Used for ISIS reporting.
  - o **Long Name**: Appears on report cards and transcripts.
  - o **Short Name**: Appears on labels.
  - o **Credit Earned**: Amount of graduation credit given each time credit is awarded.
  - o **Attempted**: Amount of GPA credit given each time credit is awarded.
  - o **Weight Added**: Points added for GPA calculation only, such as *Quality Points*.
  - o **Weight Multiplier**: Percentage used to calculate GPA. Defaults to *1.000*. A value of *0.000* will not calculate in GPA at all; a value of *2.000* will double.
  - o **Scale**: Inserted only if this course's grading scale is different from Grade System File.
  - o **Type**: Used in relation to transcript graduation requirements. Required for *VOC* (Vocational Courses) in Mississippi.
  - o **Difficulty Level**: Required for *KEES* (Kentucky Educational Excellence Scholarship) in Kentucky. Required in Indiana for Core 40 Diplomas. May also be used for graduation requirements for different tracks.
  - o **Number of Terms**: Enter the number of terms the course usually lasts. A *term* is defined as the shortest length of time for which a course may receive credit. If credit is not awarded, a term is the shortest length of time a class lasts.

- o **Priority**: Leave at *9* unless instructed otherwise. This is used with the **Automated Scheduler** utility.
- o **Link Code**: Used if the course is linked to another course with the same students. If one course is linked to another, they must be *double* linked.
- o **Pre-Req(uisite)**: Used only for scheduling a course required before another course during the same year. Does not look at *Transcript* file.
- o **Fee**: By default, the fee amounts entered here will be multiplied by number of terms for the course. This default procedure may be changed by going to **Utilities | Fees | System File** and checking the *DO NOT Multiply Fees by the Number of Terms* box for the appropriate type of fee. The names used for the various fee fields (*Fee*, *Workbook*, *Supply*, *Other*) may vary from state to state.
- o **No Fee Exceptions**: Check this box to apply the fees even when students are indicated as *Exceptions* for payment.
- o **Inactive**: Check to indicate the course is not to be used in scheduling. Inactive courses will appear on the valid course screen in a light blue font.

- Select the *Master Builder Info* tab. Most fields work in conjunction with the Master Schedule Builder. If not using the Master Schedule Builder, information entered regarding *Students Per Section*, *Honor Roll*, *Grade Sheet*, *GPA*, *Instructional Setting*, *Teaching Method*, *Funding Method*, *Gender* and *Total Periods* will copy to each section in the Master Schedule when creating new sections, or if *Apply* is checked before clicking the **Change** button, saving data entry time. Options may still be changed on the individual sections in the Master Schedule.



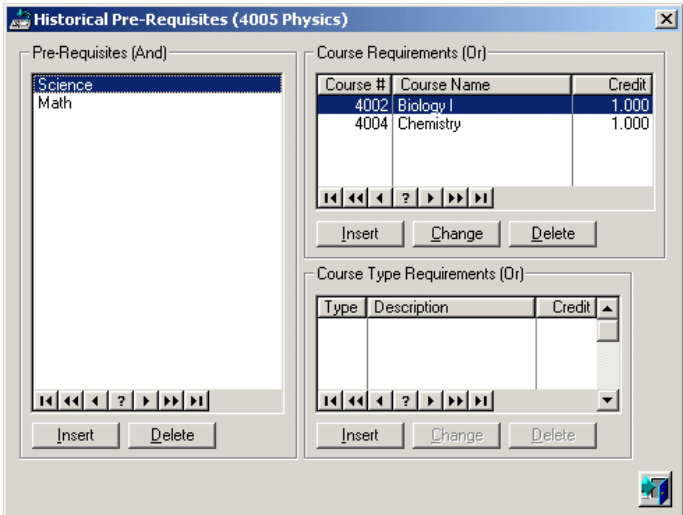
- o **Number Sections**: Enter the number of sections to be built by the Master Schedule Builder. If left at 0, the program will determine the number of sections to create based on the number of student requests.
- o **Students/Section**: Enter the maximum number of students per section.
- o **Do Maxes**: If checked, when using the Master Schedule Builder, the maximum number of seats will be populated on each section created.
- o **Sections/Terms**: Complete this field only if using the Master Schedule Builder. If number sections field is set to greater than 0, this field becomes active.
- o **Pre-Schedule**: Complete this field only if using the Master Schedule Builder. Click **Pre-Schedule** and then click **Insert** to specify the section number, beginning period and beginning terms for as many sections

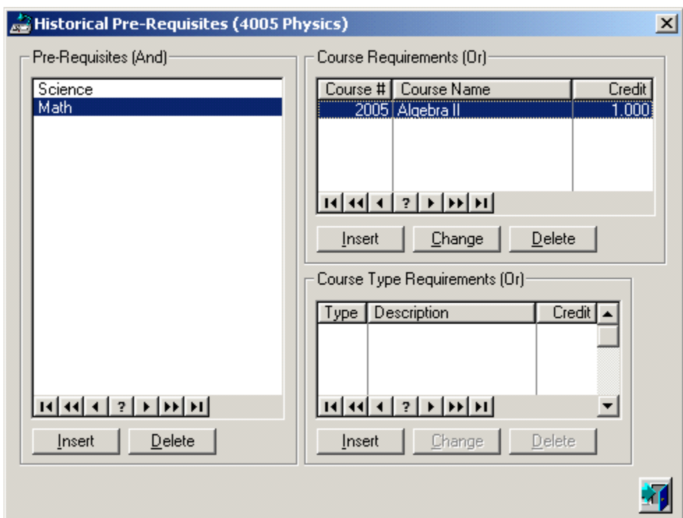
as desired for the selected course. When the schedule is built, these sections will be placed first. If no information is entered on the *Pre-Schedule* screen, the building process will place these sections in the master schedule where they fit best, based on student requests.

- **Beginning Terms Allowed**: Complete this field only if using the Master Schedule Builder. Check each term in which the course is allowed to start.
- **Periods Allowed**: Complete this field only if using the Master Schedule Builder. Check each period in which the course is allowed to start.
- **Honor Roll**: Check to include this course in the honor roll calculation.
- **Grade Sheet**: Check this box if grade sheets are to be printed for the course.
- **GPA**: Check this box if the course counts toward student grade point averages.
- **Required**: Check this box if the course is required.
- **Matrix**: Check this box if the course is to be included in the *Conflict Matrix*.
- **Grading Period for Credit**: Check the grading period(s) in which credit will be awarded.
- **Gender**: Gender may be restricted, if desired.
- **Grade Level**: Enter the typical grade level of students who will take the course. This is used for staffing information and for printing grade and scheduling reports.
- **Length (Periods)**: Enter the number of periods for which this section meets in one day. The majority of the settings will be 1, but some vocational courses may last 2 periods.
- **Attendance Type**: If using the option of lookup in master when creating schedule type definitions, select the appropriate option of instructions or non instructional for this course.
- **Instructional Setting** (optional): Choose the setting for the course, if required. The choices must be created under **Utilities | Code Maintenance | Most Codes** | *Courses*.
- **Teaching Method** (optional): Choose the teaching method for the course, if required. The choices must be created under **Utilities | Code Maintenance | Most Codes** | *Courses*.
- **Funding Method** (optional): Choose the funding method for this course, if required. The choices must be created under **Utilities | Code Maintenance | Most Codes** | *Courses*.
- **Day Met**: Only if using special scheduling options set up under **Utilities | System Utilities | System File/Information** | *System Information* tab.
- **Other Info**: This button will be available if course user fields have been created under **Utilities | Courses | User Field Definition**.
- Click **OK** when finished, to save all information.

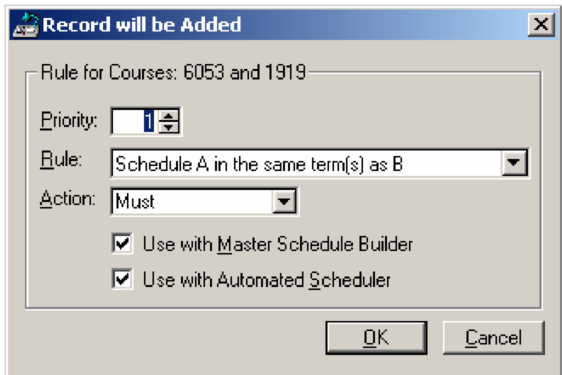
* **Change**: Click to change information for the highlighted valid course
* **Delete**: Click to delete a course no longer offered. No master schedule may be attached to the valid course that is to be deleted.
* **Cycle**: Check *Cycle* before clicking **Insert** to add multiple courses. After clicking **OK** to save the first course, the add screen will display again to add an additional course. Click **Cancel** when finished.
* **Apply**: Check this box before clicking **Change** to apply changes made in Valid Course to **all** the sections in the Master Schedule.
* **Copy**: Highlight the course to be copied and click the **Copy** button. Change the course number and any other pertinent information and click **OK**.

- **Pre-Req(uisites)**: Enter historical pre-requisites for courses. These settings work with Transcripts and the Request Error report. In the example below: For Physics, a student must earn one credit of Science (either Biology ***OR*** Chemistry) ***AND*** one credit of Algebra II.





- **Rules**: Select the course and click **Rules**. Click **Insert** in the *Courses* screen. Select the next course that will follow this rule. The rule screen will automatically display. Select the priority, rule and action. Click **OK**. To add additional criteria for these two courses, click **Insert** in the *Rules* screen. To add a different course, click **Insert** in the *Courses* screen and add criteria for this rule.



Example: Driver's Ed is A (Course #6053) and Behind the Wheel is B (Course #1919).

  - Schedule A in the same term(s) as B – Will schedule students in Driver's Ed and Behind the Wheel in the same term.
  - Schedule A in different term(s) than B – Will schedule Driver's Ed and Behind the Wheel in different terms but not necessarily Driver's Ed in a term prior to Behind the Wheel.
  - Schedule A before B (terms) – Driver's Ed will always be scheduled in a term prior to Behind the Wheel but not necessarily in consecutive terms (only available with the automated scheduler).
  - Schedule A before B (terms/consecutive) - Driver's Ed will always be scheduled in the term immediately prior to Behind the Wheel (only available with the automated scheduler).
  - Schedule A after B (terms) – Driver's Ed will always be scheduled in a term after Behind the Wheel but not necessarily in consecutive terms (only available with the automated scheduler).
  - Schedule A after B (terms/consecutive) - Driver's Ed will always be scheduled in the term immediately following Behind the Wheel (only available with the automated scheduler).
  - Schedule A different time than B (terms/periods) - Driver's Ed and Behind the Wheel will be scheduled in different terms and periods (only available with the master schedule builder).
  - Schedule A and B with same teacher – Students will always be scheduled for Driver's Ed and Behind the Wheel with the same teacher (only available with the automated scheduler).
- **Change#/Delete**: Use this button to change course numbers and/or delete courses including all sections of the selected course.

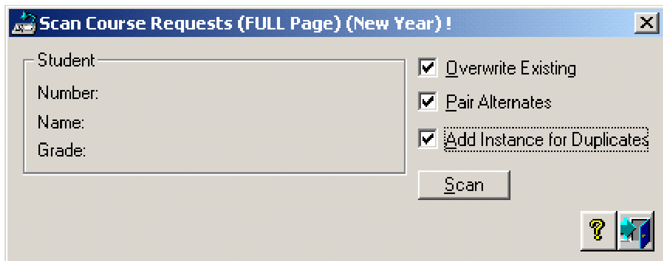
Course Requests

The following utilities for entering course requests are available under **Courses | New Year Scheduling**:

Scan Requests

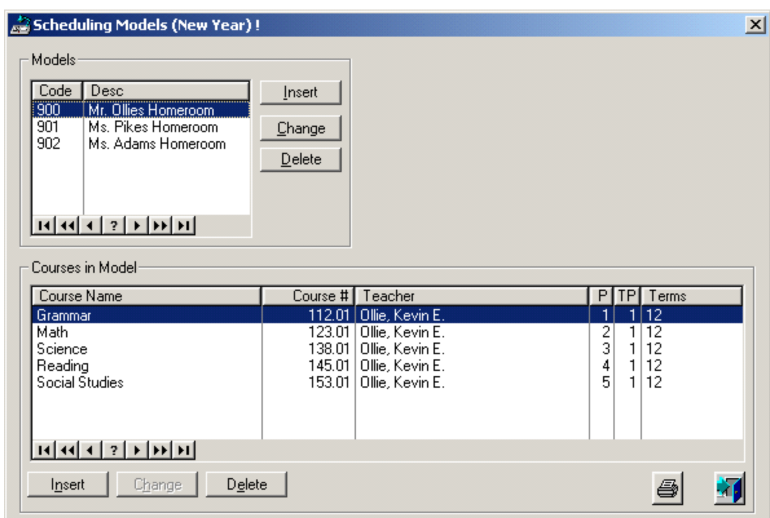
Scan sheets must first be printed under **Courses | New Year Reports | Request Scan Sheets**. To scan student requests, go to **Courses | New Year Scheduling | Scan Requests**.

- *Overwrite Existing* will replace anything already in requests with the information scanned in.
- *Pair Alternates* will pair the course marked as alternate with the previous course.
- *Add Instance for Duplicates* will enter in the number of times the course was requested.



Models

Use this feature to assign requests to students by a filter. To create models, go to **Courses | New Year Scheduling | Models**.

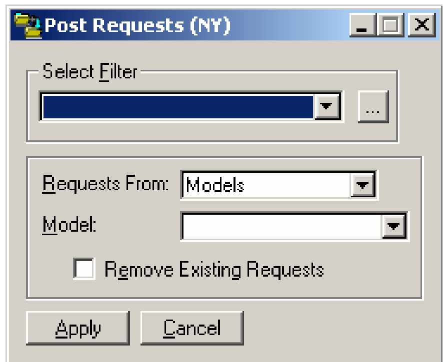


- Click the upper **Insert** button to the right of the *Models* box.
- Enter a *Code* and *Description* and check Homeroom to select sections from the master schedule or Requests to select courses from the Valid Course file.
- Make sure the correct model is selected in the *Models* box. Then click **Insert** under the *Courses in Models* box.

- Click **Insert** and use the **Ellipsis** button to the right of the *Course Number* field to select each course to be included in the model (click the **Select** button to add each course). Enter any pertinent information in the data fields provided. Click **OK** to add the course to the model. Click **Cancel** when finished.
- When all models have been entered, click on the printer icon to generate a *Models List*.

Post Requests from Models/Plans

Select **Courses | New Year Scheduling | Post Requests from Models/Plans** to post course requests for a selected group of students, based on either *Models* or *Career Plans*.

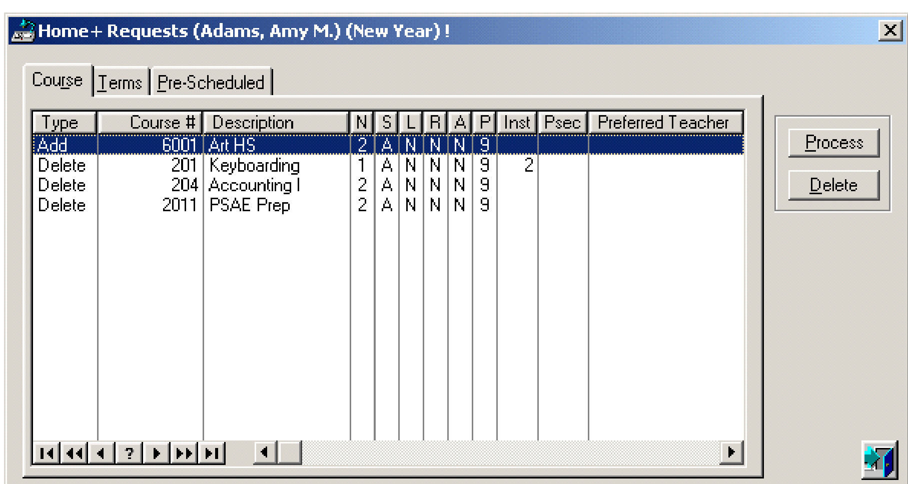


Note: To apply a request model to an individual student, go to **Courses | New Year Scheduling | Desktop** or **Add/Edit Student Information**. Click the **Requests** button and then click the icon in the lower left-hand corner. Select the model and click **Apply**.

Post Requests from Home/Home+

If users are allowed to enter and edit requests through Home or Home+, these requests may be printed by going to **Courses | New Year Reports | Home+ Requests**. To process these changes, perform the following steps:

- Go to **Courses | New Year Scheduling | Add/Edit Student Information**.
- Highlight a student and click **Requests**.
- Click **Home+**.



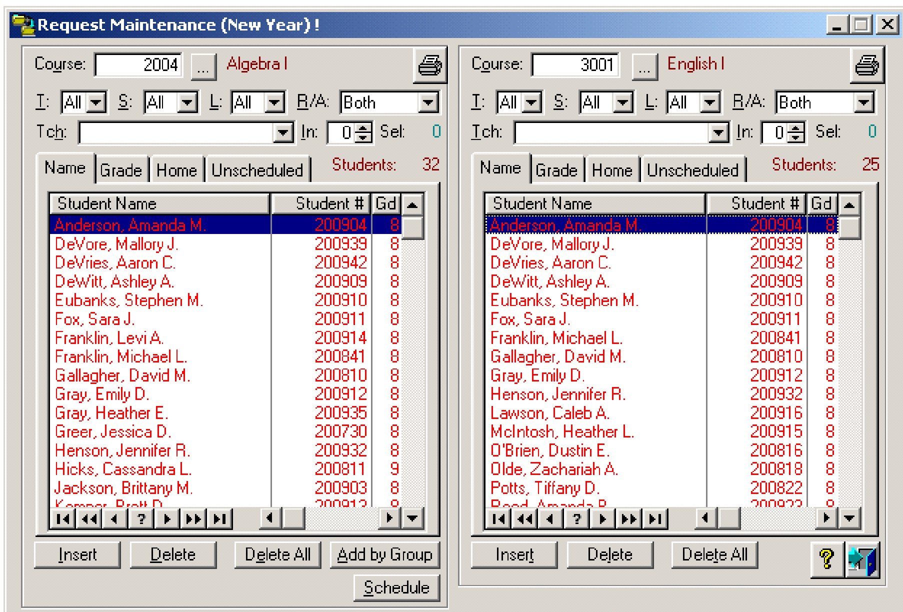
- Requests that students have added appear with an *Add* in the Type column. Requests that students have deleted will show as *Delete* in the type column.
- To accept the change(s), highlight the record(s) and click **Process**.

> Note: If not selecting all records, a message will appear asking if the user wants to delete Home+ requests that you have not selected to process. If **Yes** is chosen, all non-selected requests on the *Home+* screen will be deleted. Click **No** to process the selected record and leave all remaining changes.

- To reject the change(s), highlight the record(s) and click **Delete**.

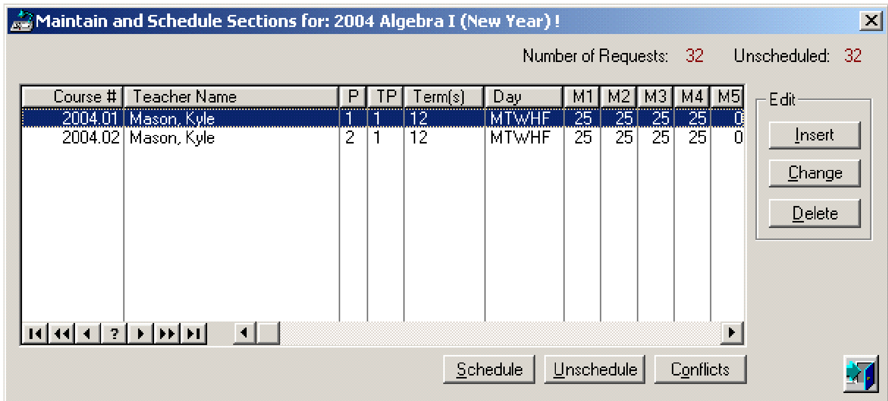
Request Maintenance

Go to **Courses | New Year Scheduling | Request Maintenance**. This option is used for mass-adding and modifying student requests.

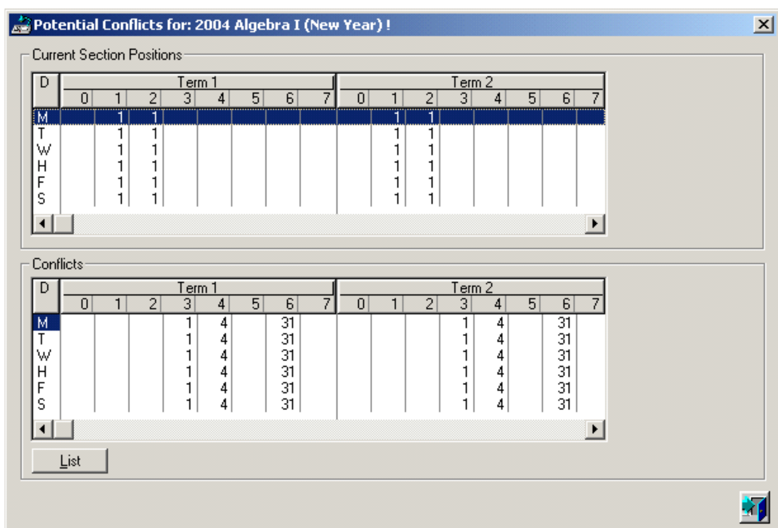


- **T**: Terms
- **S**: Starting term
- **L**: Link
- **R/A**: *Required*, *Alternate* or *Both*
- **Tch**: Preferred Teacher
- **In**: Number of Instances
- **Insert/Delete/Delete All/Add By Group**: Students may be inserted or deleted individually or en masse.
- If the user selects a second section on the right hand side of the screen, students may be copied or moved into the second section. To do this, highlight the students on the left, then drag and drop the students onto the right. A menu appears with the option to **Copy All**, **Copy Marked**, **Move All** or **Move Marked**. Select one of the options and the students will now have requests for the second class.

- **<u>Schedule</u>**: This button provides a tool to help build a master schedule. Click on the Edit buttons to **Insert**, **Change** or **Delete** sections. The **Schedule** button allows scheduling of this course only. This will NOT honor links or chains. The **Unschedule** button will remove this course from all student schedules.



- The **Conflicts** button will show potential conflicts with courses marked for Matrix in the master schedule. The top half of the screen shows where the sections currently are scheduled. The lower portion of the screen shows possible conflicts with other courses the same group of students have requested. In the example below, since Algebra is scheduled for periods 1 and 2 only, there are no conflicts with any courses marked for Matrix in the Valid Course file.



Individual Students

Go to **Courses | New Year Scheduling | Add/Edit Student Information** or **Student Desktop** to add requests on an individual student basis. This is most often used in conjunction with one or more of the preceding methods for entering requests. For example, a model may be applied which has only the core subjects attached to it. Then any electives may be added to the student from this screen. Also, changes may be made from a general course to the advanced option for the same course. To do this, click **Requests**. To enter several requests individually, check the *Cycle* box or use the **Quick Entry** button. Alternates and alternate pairs may also be added to students from this option.

Request Reports

The following course request reports are available under **Courses | New Year Reports**. Suggested reports are indicated with the ** symbols.

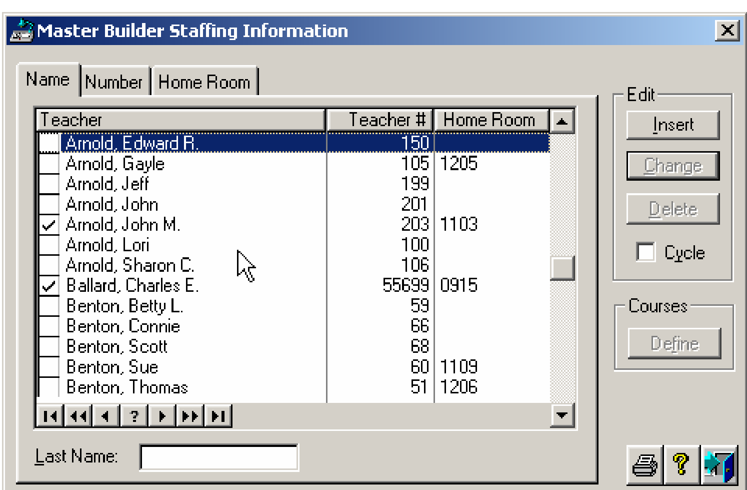
- **Request Scan Sheets**: Prints scan sheets for collecting course requests.
- ****Request Verifications**: Prints verifications of student requests along with the option to print fees, demographics and students with no requests. Options are also available to include a parent signature line and the date signed for parent and student.
- **Detail Request Roster**: Prints names of students who requested specific courses, along with detailed demographic information in a list format. Options include printing non requested courses, un-scheduled only and alternate only courses.
- ****Summary Request Roster**: Prints counts of students who have requested specific courses.
- ****Request Errors**: This report will list information such as student with not enough requests, too many requests, not meeting historical pre-requisites, courses already taken for credit and more. If *Valid Grade Level* is selected, the student's grade level will be checked to make sure it is within the range of the starting and ending grade level in the Valid Course File. The assumption is that the student's grade level will be one grade higher than the current grade level. If all students will be scheduled into a study hall, check *Not Enough Requests*.
- **Conflict Matrix**: This is a report displaying all courses checked for *Matrix* in the valid course file. It may be printed in a matrix or list format. The report shows the number of scheduling conflicts that will occur if two courses are offered at the same time.
- **Request Analyzer**: This report displays course requests to determine whether students have requested any courses that pose potential conflicts in scheduling.

Master Schedule Builder

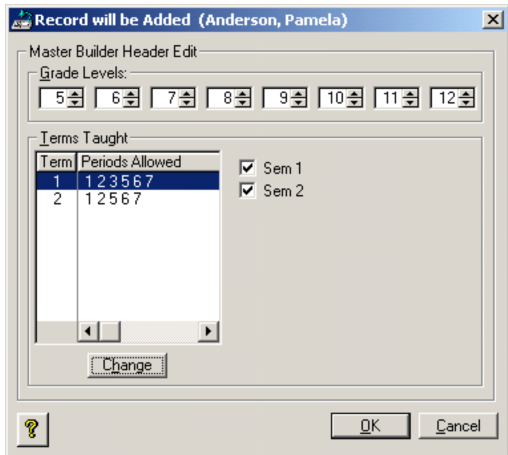
The following *master schedule* utilities are available under **Courses | Master Schedule Builder**:

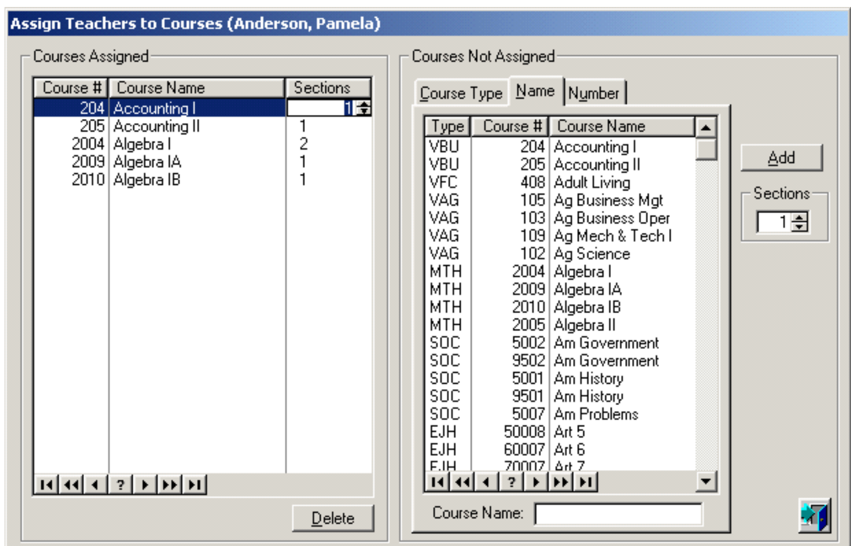
Staffing Information

Used to set up criteria for placing teachers in the Master Schedule. This utility creates a record of staff members, along with their grade levels and courses taught, that will be used by the Master Schedule Builder when building the temporary master schedule. Staffing information is tied to specific courses.



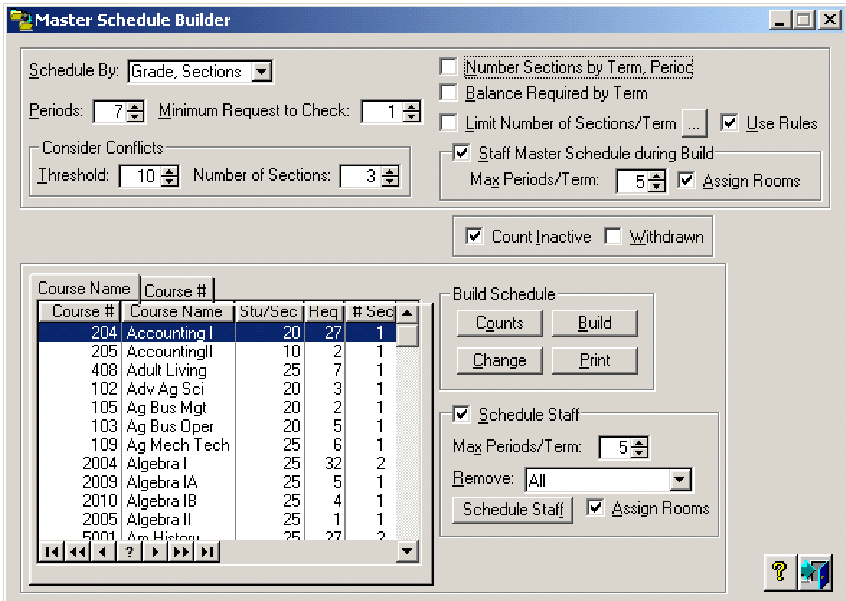
- Click the **Insert** button to indicate the grade levels the teacher may teach as well as the periods of the day the teacher is available for each term.
- Click the **Define** button to assign the course to the teacher, including the maximum number of sections of each course the teacher may teach.





Build Schedule and Staff

This utility uses student course requests to create the correct number of sections for each course requested by students. Sections are then placed in the optimal class periods of the school day. Staffing is optional.



Before building, select criteria:

- **Schedule By**
- **Periods**
- **Minimum Requests to Check**
- **Number of Sections by Term, Period**
- **Balance Required by Term**
- **Limit Number of Sections/Term**: Click the **Ellipsis** button to enter in the number of classes that may be offered each period of each term.
- **Use Rules**
- **Consider Staffing Info with Build**
- **Count Inactive**
- **Withdrawn**
- **Schedule Staff**
  - **Max Periods/Term**: Enter in one period less than the total in the day to allow for a free or prep period for each teacher.
  - **Remove**: Select *All* to remove all teachers from the temporary master schedule. Select *Those with Staffing Info* to remove only those teachers with staffing information defined from the temporary master schedule.
  - The **Schedule Staff** button will only schedule staff in an existing master schedule.
  - **Assign Rooms** will assign the teacher rooms to the classes.

- Click **Counts** to generate a list of courses with the number of suggested sections based on the number of students requests. This number is based on the number of students per section entered in the valid course file. Click **Change** to modify the number of students per section.
- Click **Print** to give a hard copy for administrative use.
- If the program is to schedule staff while building the master schedule, check *Schedule Staff*. The program, when building the master schedule, will schedule staff into each section based on the criteria defined under **Courses | Master Schedule Builder | Staffing Information**. If teachers are scheduled into multiple period classes, both periods are counted when determining the class load if using the **Max Periods/Term** option. When scheduling staff, consideration is given to the times at which teachers are available when balancing assignments. Within a specific course, sections with the fewest teachers available receive staff assignments first.
- Click **Build**.
- Click **Print** to see a list of errors generated while building the master schedule.

Master Schedule

Select to view, modify or print the temporary master schedule. See “Master Schedule (New Year)” below for an explanation of each field.

Move Master to New Year

The master schedule built by STIOffice is only temporary until moved to the new year master schedule by going to **Courses | Master Schedule Builder | Move Master To New Year**

Master in Matrix

This utility will print the temporary master schedule in matrix (grid) form, with teachers listed down the left side of the page and class periods displayed across the top. If teachers are not assigned to sections in the master schedule, nothing will be displayed.

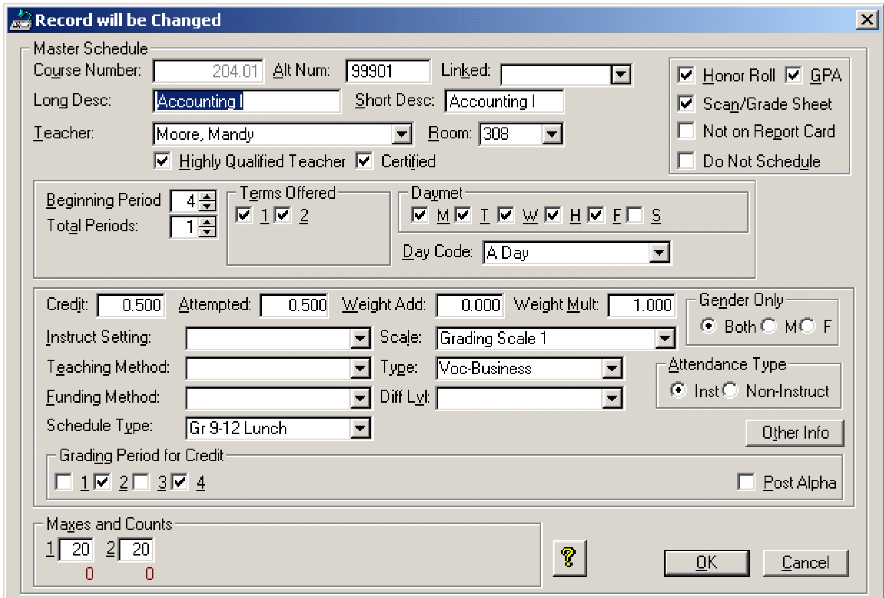
Master Analysis

This utility will analyze the master schedule and print course information for each Period/Term, including: the number of seats available; the number of seats per grade level; the number of sections; and the number of sections by grade.

> Note: If any changes have been made to the built master schedule, be sure to move it to the new year by going to **Courses | Master Schedule Builder | Move Master To New Year**.

Master Schedule (New Year)

Select **Courses | New Year Scheduling | Master Schedule** to create or modify the new year master schedule. Click **Insert** to add a new record or select a record and click **Change** to modify it.



- **Course Number**: Course section numbers appear in the decimal spaces after the course numbers. To generate section numbers, click **Insert**. If the course number is not known, press the *Tab* key to access the valid course file. If the course number is known, type the course number and then press the *Tab* key and the program will automatically assign the section number. To manually assign the number, enter the course and section numbers.
- **Alt Number** (optional): If required for state reporting, an alternate number may be entered.
- **Linked**: If the course has been linked in the *Valid Course File*, select the section of the other course from the drop-down list to link it to this section. Both sections of each course must be linked to each other.
- **Long Description**: This will appear on report cards and transcripts.
- **Short Description**: This will appear on permanent record labels.
- **Teacher**: Choose teacher from the drop-down list.
- **Certified**: Check this box if the teacher is certified to teach the course (required for some state reports).
- **Highly Qualified Teacher**: Check this box if the teacher is highly qualified to teach the course (required for some state reports).
- **Rooms**: Rooms are created under **Courses | Room File**. The room that has been assigned to the teacher under **Teacher | Add/Edit Teacher Information** will be automatically displayed in the *Room* field after the teacher is selected. If applicable, click the drop-down arrow to select a different room.
- **Beginning Period**: This refers to the period of day the class will begin. Self-contained classrooms may use either *Period 1* or separate periods.
- **Total Periods**: This refers to the total number of periods the section will meet. For elementary schools, the length is generally 1. This value may only be changed before students are scheduled. For example, beginning period 1, total periods 3 means the class starts first hour and lasts through third period.
- **Mins**.: This option is only available for those schools using the minutes per course section feature.

- **Terms Offered**: Select the actual terms in which the section is taught.
- **Day Met/Day Code**: These options will only be available if special scheduling is selected under **Utilities | System Utilities | System File/Information |** *System Information* tab. An example of a Day Met school would be a school with alternating A/B days. An example of a Cycle school would be a school with alternating A/B days, with a C day where all classes meet every Friday.
- **Credit**: Amount of graduation credit given each time credit is awarded.
- **Attempted**: Amount of GPA credit given each time credit is awarded.
- **Weight Added**: Enter the number of quality points to be added to the grading scale value for the score during GPA calculation. For example, if when calculating a standard GPA, an A normally receives 4 points during calculation and a 1 is entered in the *Weight Added* field, a student would receive 5 points during GPA calculation.
- **Weight Multiplier**: Enter the number of times the A grade received for this course will be counted during GPA calculation. For example, if calculating a numeric GPA and the student receives an 89 for this course and a 2 is entered in the *Weight Multiplier* field, the 89 score would count twice in the GPA calculation. If a 0 is entered, the score received for this course will not be included in GPA calculation.
- **Instructional Setting** (optional): Choose the setting for the course, if required. The selections must be listed under **Utilities | Code Maintenance | Most Codes** | *Courses.*
- **Teaching Method** (optional): Choose the teaching method for the course, if required. The selections must be listed under **Utilities | Code Maintenance | Most Codes** | *Courses.*
- **Funding Method** (optional): Choose the funding method for the course, if required. The selections must be listed under **Utilities | Code Maintenance | Most Codes** | *Courses.*
- **Schedule Type**: To print the schedule type on the student schedule, assign it here.

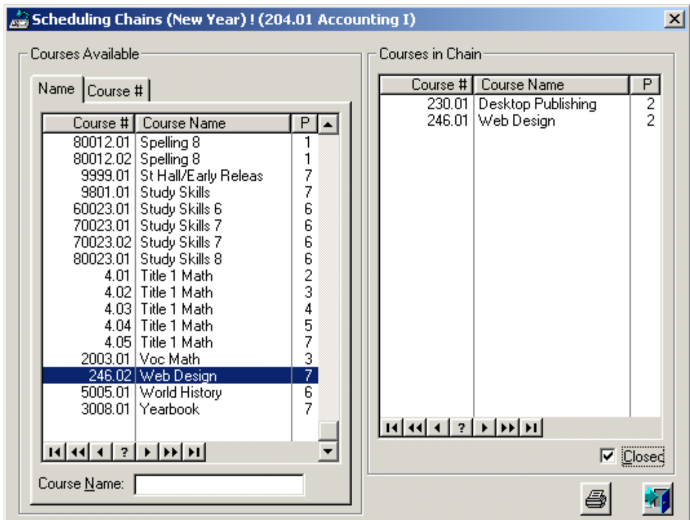
> Note: This does not affect attendance calculations. Schedule types must still be assigned to students.

- **Scale** (optional): Required only if the course uses a grading scale other than the default scale set up in the grade system file.
- **Type**: Select the subject type of the course: *Math*, *English*, etc. Required for *VOC* (*Vocational Courses*) in Mississippi.
- **Difficulty Level**: Select a value for diploma requirements. In Kentucky, this field is used for KEES calculation identification; and in Indiana, it is used for Core 40 Diplomas.
- **Gender Only**: By default, this field is set to include *Both* genders in the course. Restrict the gender if desired by selecting either male or female.
- **Attendance Type**: By default, the course is designated as *Instructional*. If the course is *Non-Instructional*, change the setting by clicking the appropriate bullet.
- **Other Info**: This option will appear if using the User Fields for courses created under **Utilities | Courses | User Field Definition**.
- **Grading Period for Credit**: Check each grading period in which credit is to be awarded for the course.
- **Post Alpha**: To post alphabetical grades rather than numeric grades from STIClassroom.
- **Maxes and Counts**: Enter the maximum number of seats desired for this section. This number is used by the Automated Scheduler when *Check for Maximum Class Size* is checked.
- **Honor Roll**: When this box is checked, the course will be included on the Honor Roll report if *Check Master* is selected on the Honor Roll print setup menu.
- **GPA**: Check this box if the course counts toward student GPA calculations.
- **Scan Grade Sheet**: Check this box if grade scan sheets are to be printed for the course.

- **Not on Report Card**: Check this box to prevent the course from being included on the report card.
- **Do Not Schedule**: Check this box to prohibit the *Automated Scheduler* utility from scheduling students into the course. The Automated Scheduler will only schedule students into this course if they have requested this particular section through pre-scheduling when their request was entered.

Scheduling Chains

The **Scheduling Chains** feature is used to link sections of multiple courses together. Double-click the sections to be added to the chain. After the  icon is clicked, a prompt will appear to add the original section to the chain. Click **Yes**. Check the *Closed* box to keep orphan requests from being scheduled.



Team Scheduling

Teams of teachers may be grouped together for scheduling purposes by going to **Courses | New Year Scheduling | Team Maintenance**.

For example:

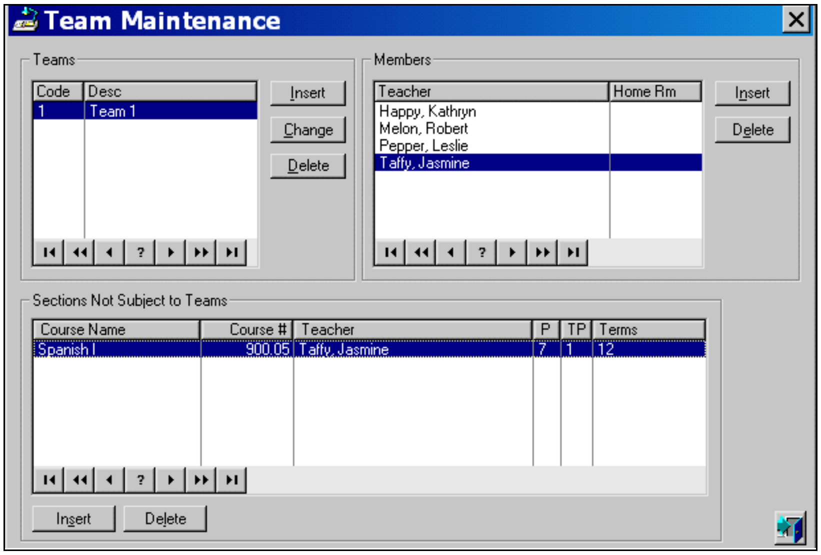
Team 1 teachers:
Mrs. Jones for English
Mrs. Smith for Math
Mr. Harris for Social Studies
Ms. Williams for Science

Team 2 teachers:
Mr. Walker for English
Ms. Roberts for Math
Mr. Taylor for Social Studies
Mrs. Davis for Science

When the scheduler runs, if the system decides the best 1st period class for a student is *Science* with Mrs. Williams, the system will automatically populate the rest of the student's schedule with classes taught by the other team members. Thus, this student would become a member of Team 1, and the other three "core" classes would be scheduled with the other teachers on Team 1. It is not necessary for the user to pre-set students to a team; the team chosen for a student is determined automatically by the scheduler based on the "best" schedule determined for the student. However, the user may manually assign students to teams. See the section "Manually Assigning Students to Teams" on page 25 for instructions.

Team Maintenance

To assign teachers to Teams as described above, go to **Courses | New Year Scheduling | Team Maintenance**. The *Team Maintenance* window will appear, as shown below.

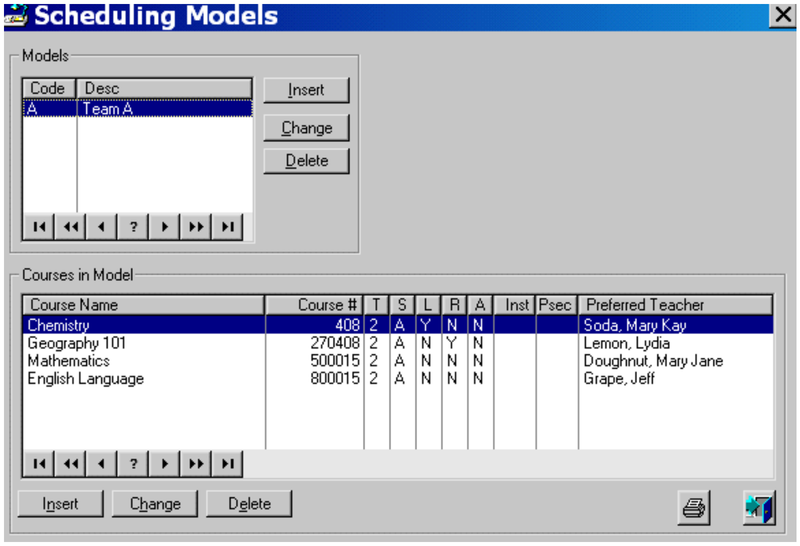


- Click the **Insert** button to the right of the *Teams* section in the upper left corner. Enter the Code and Description (ex. *Team 1*, *Team 2*, etc.) and click **OK**.
- Click the **Insert** button to the right of the *Members* section in the upper right hand corner. Highlight a teacher to be included in this team and click **Select**. Continue adding teachers until team is complete.
- If any teachers within in the team teach courses that are not subject to team scheduling, click the **Insert** button below the *Sections Not Subject To Teams* section and select those courses.

Manually Assigning Students to Teams

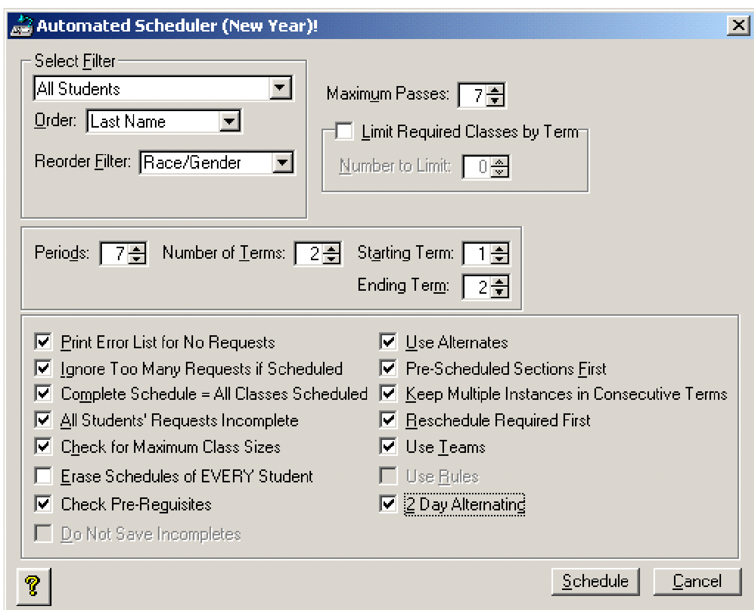
If the user wishes to manually select the students on each team rather than have the system determine student team members, the user should create a *Request Model* assigning the selected teacher to each subject. Then it would be necessary to assign the Model to each student on the pre-determined team.

The Request Model example below shows the selection of each subject and the teacher pre-determined to teach all students who are assigned this Request Model. For details on creating Models, see the section “Models” on page 14.



Automated Scheduler

To schedule students into classes based on student course requests, select **Courses | New Year Scheduling | Automated Scheduler** and enter the following information:



- **Select Filter**: Select the students that are to be scheduled into classes. If incoming students were set to inactive, be sure to use a filter that includes these inactive students.
- **Order**: Select the order in which to schedule students. If *Grade* is selected, a box will appear providing the option to schedule in *Reverse Order* (from highest grade to lowest).
- **Reorder Filter**: This provides the option to reorder the selected filter by *Race/Gender* or by *Possible Sections*.

- **Maximum Passes**: Enter the maximum number of times for the utility to try to schedule a student before moving on to the next student. The default number is *7*. This number may be increased but keep in mind that additional passes will take longer to schedule and may not significantly reduce the number of errors.
- **Limit Required Courses by Term**: Check this box to limit the number of required courses that may be scheduled each term. However, if this feature is used, more scheduling conflicts may result and therefore a lower percentage of schedules may be completed. If this box is checked, enter the number of required courses allowed per term in the *Number to Limit* field that appears. This works best for schools using *4 Block Schedules*.
- Choose the appropriate number of *Periods* and *Terms*. May schedule for a full year in one run.
- Check any of the boxes described below to set the parameters for the Automated Scheduler. IMPORTANT: If the *Erase Schedules of EVERY Student* box is checked, schedules for all students in all grades will be erased, regardless of filter selected.
  - **Print Error List for No Requests**: Check this box to print an error report listing all students (from the selected filter) who have no course requests.
  - **Ignore Too Many Requests if Scheduled**: If a student has a complete schedule, this switch will prevent the utility from indicating an error if courses are left over (too many requests).
  - **Complete Schedule = All Classes Scheduled**: Check this box if you wish Automated Scheduler to consider a student schedule as *complete* when all requested courses are scheduled.
  - **All Students' Requests Incomplete**: If all students have too few requests for the number of periods to schedule, this switch will schedule all students across all periods without creating a scheduling error
  - **Check for Maximum Class Size**: Check this box to enforce maximum class sizes, as set up in each course's master schedule record.
  - **Erase Schedules of EVERY Student**: Check this box to delete ALL schedules for ALL students, regardless of selected filter.
  - **Check Pre-Requisites**: Check this box to check the Valid Course File for pre-requisites before scheduling.
  - **Do Not Save Incompletes**: Check this box to remove a student's schedule if the schedule is not complete.
  - **Use Alternates**: Check this box to have Automated Scheduler attempt to schedule alternate requests if regular requests cannot be scheduled. This will only work if Alternate pairs are recorded for students.
  - **Pre-Scheduled Sections First**: Check this box to schedule students who have been assigned *pre-scheduled sections* first.
  - **Keep Multiple Instances in Consecutive Terms**: Check this box to schedule requests with multiple instances in consecutive terms.
  - **Reschedule Required First**: Check this box to re-schedule required courses first, whenever required courses have not been scheduled.
  - **Use Teams**: Check this if using team scheduling.
  - **Use Rules**: Check this box if Rules should be considered.
  - **2 Day Alternating** (optional): Check this box if using special scheduling.
- Click the **Schedule** button. Automated Scheduler will begin deleting old schedules and adding new schedules for the students selected.

Once the procedure has completed, an Error List for each student may be printed. Based on the error information, change the Master Schedule and/or correct each student's error (by going to each student's requests to add or change requests), then re-run the Automated Scheduler. Repeat these steps until the Error List reaches an acceptable number; then hand-schedule the remaining students with errors.

IMPORTANT: If the automated scheduler is run again after hand-scheduling students, the students will need to be hand-scheduled again.

Archive/Restore Schedules

Go to **Courses | New Year Scheduling | Archive/Restore Schedules**.

- **Archive**: This utility archives the Valid Course File, Master Schedule File and all student schedules from an Automated Scheduler run. Check *Show All Years* to display all archived schedule runs.
- **Restore Archive**: Once an archive record has been created, this button will appear. Select an archive record and click **Restore Archive** to restore the Valid Course File, Master Schedule File and all student schedules as saved in that archive.

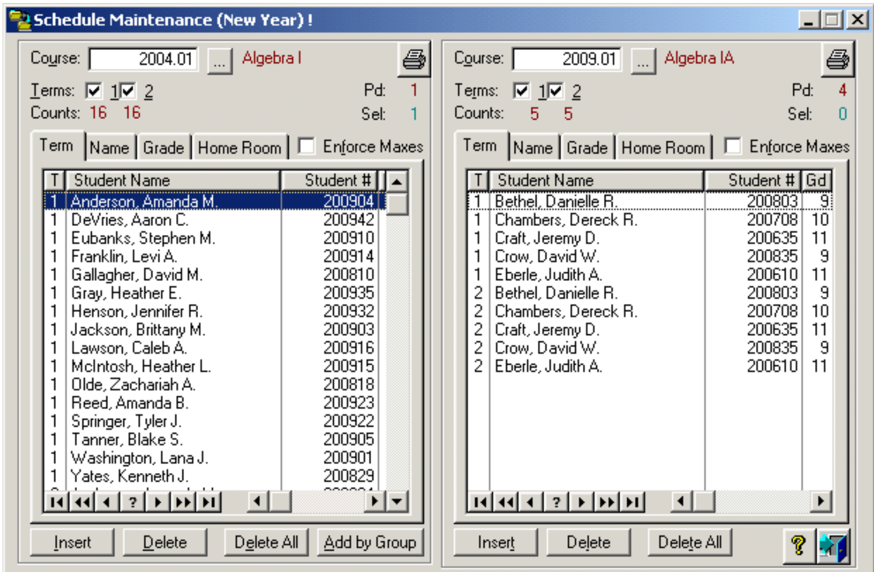
Schedule Reports

The following scheduling reports are available under **Courses | New Year Reports**:

- **Course Rosters**: Rosters may be printed in teacher, course or period order. Selecting a student filter and/or entering in grade levels will narrow down the list of rosters to print.
- **Master Schedule Summary**: This report will list each course in the master schedule, together with race, gender, grade levels and lunch totals of students. Choose to print by term, grade, lunch, or grade breakdown by class. Additionally, choose to print by teacher, period, course name, or course number.
- **Master In Matrix**: This report will print the temporary master schedule in matrix (grid) form. In teacher order, teachers are listed down the left side of the page and class periods displayed across the top. A teacher filter must be selected to determine the parameters of the form. In Department order, departments are listed down the left side of the page and class periods are displayed across the top. Select a range of departments to print or leave at default to print all.
- **Master Analysis**: This report will analyze the master schedule and print course information for each Period/Term, including: the number of seats available; the number of seats per grade level; the number of course sections; and the number of sections per grade level.
- **Room Utilization**: This report lists the classes per period assigned to each room at the school.
- **Free Teachers/Rooms**: This report lists either free teachers or rooms for a selected period/day.
- **Unscheduled Periods by Student**: This report provides counts of students who have unscheduled periods in their schedules.
- **Incomplete Schedules**: This report lists students who have incomplete schedules or no schedules at all.
- **Student Schedules**: This report will print copies of schedules to be given out to students. Options of including fee, demographic and schedule types are available. When printing fees, the *Multiple by Term* settings in the fee system file are taken into account.
- **Schedules in Matrix**: This report will print students' schedules in matrix or grid format, with the student names down the left side and period numbers across the top of the page. The course, teacher, meeting dates and room numbers will be displayed below each period. Several students' schedules will be displayed on one page.

Schedule Maintenance

Select **Courses | New Year Scheduling | Schedule Maintenance**. This scheduling utility allows students (individually or by group) to be copied or moved from one course to another. Students may also be deleted from scheduled courses or course rosters may be built by hand. This feature is often used to shift large groups of students after they have been scheduled into classes. Do not use this utility prior to running the *Automated Scheduler*.



The *Schedule Maintenance* screen is divided into two parts. On the left one course (and all its scheduling information) from your Master Schedule is displayed. On the right, the same information about any other course in your master schedule may also be displayed.

To bring class rosters for two courses to the screen, click the **Ellipsis** button next to the *Course* field at the top of each side of the menu, then select a course and section number to view or type in the course number and press the *Tab* key. Following is a list of the fields displayed onscreen:

- **Course**: The course and section number selected above will be displayed here.
- **Terms**: Only students scheduled into the terms selected will display. Therefore a student scheduled into the class for one term only will not display if that term is not checked. Counts will be displayed for each term selected.
- **Pd** (Beginning Period): This information pulls from the master schedule.
- **Enforce Maxes**: To enforce the maximum counts for this course, check this box.
- **Tabs**: You may re-display the class roster in a different order, by clicking on the appropriate tab (*Term*, *Name*, *Grade* or *Home Room*).
- To move all students from one class to another, left-click on a single student in that roster, then drag the student to the other class roster, release the mouse button and click **Move All**. This will delete all the students from their original roster and place them in the new course and section. Alternately, select **Copy All** to copy all students from one roster to the other, without deleting the students from the original roster.
- To move selected students from one class to another, left-click on the student(s) and drag the student(s) to the other roster, then click **Move Marked**. Alternately, select **Copy Marked** to copy the student(s) from one roster to the other, without deleting the record from the original roster.
- Click **Insert** to add students to the course.

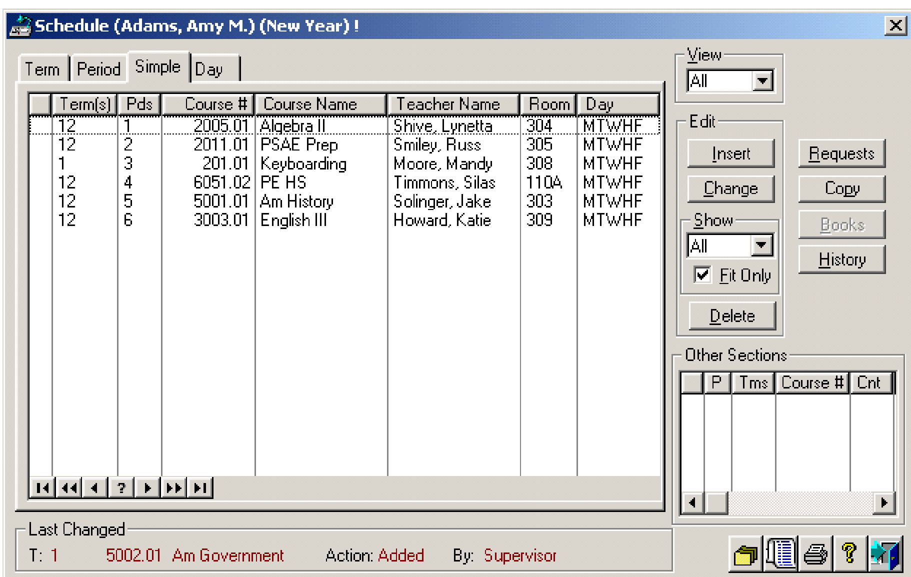
- To remove selected student(s) from a course, highlight the student(s) in the roster and click the **Delete** button below the appropriate roster. The student(s) will be removed from the roster displayed.
- To remove all students from a course, click the **Delete All** button below the appropriate roster.
- **Add by Group**: To add a group of students (a *Home Room*, an entire *Grade Level* or a user-defined student *Group*) to the course displayed on the left side of the *Schedule Maintenance* menu, click the **Add by Group** button and complete the information.
- After opening a different section/course on each side of the screen, right-click on a list of students and choose to **Select Students in Common**; when selected, students who are scheduled into each of the two courses will be highlighted.

To print rosters from this screen, click the printer icon.

Changing a Student's Schedule

The procedure for changing a student's schedule is the same whether working in New Year or Current Year.

- In *New Year*, click on **Courses | New Year Scheduling** and then select either **Student Desktop** or **Add/Edit Student Information**.
- In *Current Year*, click on **Students | Desktop** or **Add/Edit Student Information**. Look up the student if using *Desktop* or highlight the student if working in *Add/Edit Student Information* and then click the **Schedule** button.



The student's schedule will be displayed on the screen. At the top of the screen is a *View* field that will determine the way the schedule is displayed. Click on the drop-down arrow and select the view preferred. Schedules may also be viewed by *Period* or by *Term*.

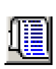
Inserting a New Course

- To insert a new course on the student's schedule, click **Insert**. If *Fit Only* is not checked, the entire master schedule will display on the split screen. If *Fit Only* is checked, only sections that will fit into the student's existing schedule will be displayed.
- In the Master Schedule, select the sections to be added on the top of the screen and either double-click or use the down arrow to move the section to the bottom of the screen. Continue until all sections have been selected. Review the bottom of the screen to be sure the selections are correct.
- Highlighting a section at the bottom of the screen and using the up arrow will remove the section from the *Add* window. When all selections are correct, click the **Add** button. The sections will be added to the student schedule and display in red until the screen is refreshed.

Changing a Course Section

- To change a section in the student's schedule, highlight the section to change. With that section highlighted, other sections of the selected course will be displayed in the lower right corner of the screen.
- If the student is simply being moved to another section of the same course, highlight the new section in the box in the lower right corner and then use the mouse to drag and drop the new section into the student's schedule. The new section will appear in red on the student's schedule, and the previous section will be removed.
- If the student is being moved to a completely different course during the same period. Click the **Change** button. Select the section(s) to be added in the Master Schedule on the top of the screen and either double-click or use the down arrow to move the section to the bottom of the screen. Click on the **Add** button and the selected sections will be added to the student's schedule and will display in red until the screen is refreshed.

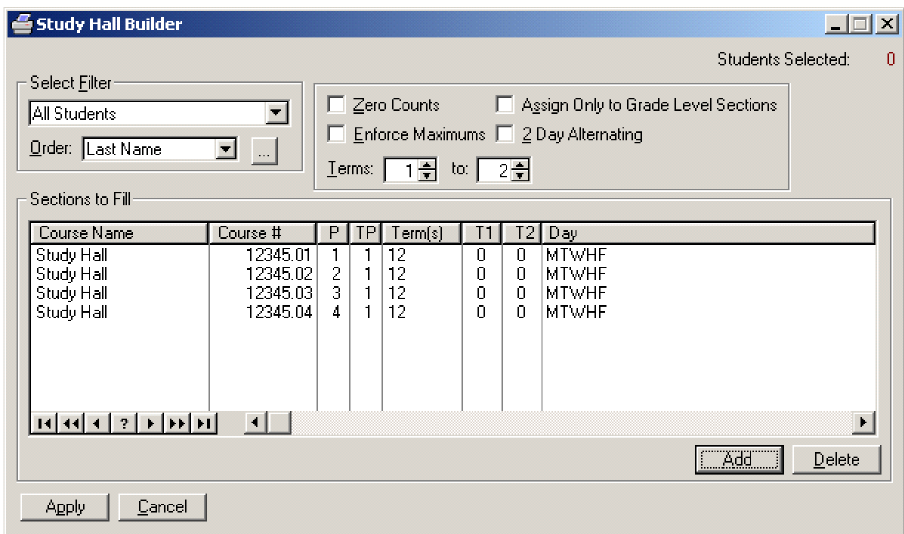
Other Information about Schedule Changes

- If **All** is selected in the *Show* drop-list, the entire Master Schedule will display on the split screen. If *Period* is selected in the *Show* field, only the courses that meet the same period as the highlighted course will display. If *Others* is selected in the *Show* field, only other sections of the highlighted course will display.
- The **Delete** button will delete the highlighted section(s) from the schedule.
- The **Requests** button, if active, will allow access to unscheduled requests. On the request screen, click on the tree to the left of the course to view available sections of the course. Highlight the section to be added and then drag and drop the section into the schedule.
- The **Copy** button will allow the schedule displayed onscreen to be copied to another student. You may select to either *Overwrite* the latter student's current schedule or *Add To* the student's current schedule.
- The **History** button will display all schedule changes along with the date, the action, and the user who took the action. The last schedule change will display at the bottom of the schedule screen.
- The **Credit** button will allow credit overrides for credit earned and/or attempted for the highlighted section in the student's schedule.
- The  (**Pick a Model**) icon at the bottom of the screen will allow a Home Room Model to be applied to the student's schedule.
- The  (**Roster**) icon will display the course roster for the highlighted section.
- The printer icon will allow the student's schedule to be printed.

Study Hall Builder

To fill a student's schedule with study hall whenever no class is scheduled, go to **Courses | New Year Scheduling | Study Hall Builder** and perform the steps listed below:

- Select student filter to use.
- Check *Zero Counts* to remove all students from class before scheduling in new students.
- Check *Enforce Maximums* to assure that no section is overfilled.
- Check *Assign Only to Grade Level Sections* to keep students together by grade levels entered in master schedule.
- Check *2 Day Alternating* if Day Met schedule is based on two day rotation.
- Enter beginning and ending terms to schedule.
- Click on **Add** to select the sections in which students are to be scheduled. **Delete** would remove any section.
- Click **Apply** to schedule students into these classes.



Moving New Year to Current Year

Data entry performed in New Year scheduling can be moved to the Current Year during the **Rollover** process if the *Automated Scheduler* and *Study Hall Builder* will no longer be used. If scheduling is not complete before **Rollover**, New Year scheduling can be moved to Current year at a later time when all scheduling work is complete.

- To move New Year scheduling to the Current Year, click on **Courses | New Year Scheduling | Move New Year to Current Year**. If **Rollover** has not yet been performed, the program will not allow this process to take place. If **Rollover** has been performed, a warning will pop up notifying you that you must be the only user logged into STIOffice. Click **OK** to proceed if you are certain that this is the case.
- On the *Move New Year to Current Year* screen, the *Valid Course File* and *Master Schedule* will be selected by default. This indicates that the *Valid Course File* and *Master Schedule* from the New Year will be moved to the Current Year.
- Additional options include *Scheduling Models*, which will move New Year Scheduling Models to Current Year; and either *Complete Student Schedule File* or *Partial Student Schedule File*. If New Year scheduling has been done for the entire year, check *Complete Student Schedule File*. If New Year scheduling has been done for only

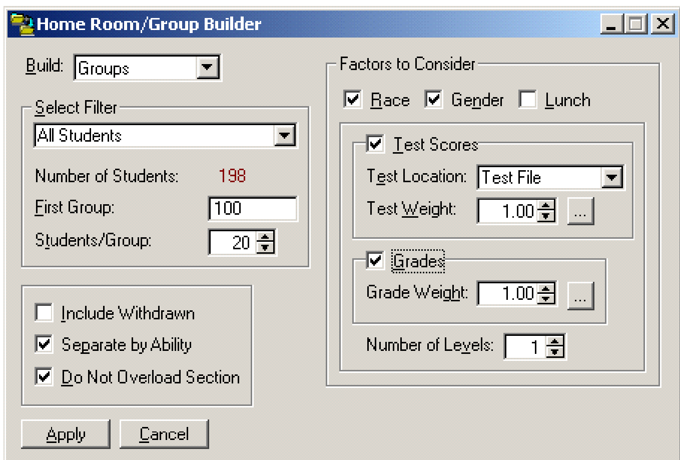
part of the year, check *Partial Student Schedule File* and select the starting and ending terms to move to Current year. Click **Apply**.

- A notice will appear stating that affected will be backed up with an extension of *tp$*. Click **OK** and the selected files will be moved from New Year to Current Year.
- Be sure that all users who are working in scheduling are aware that this procedure has been performed, so that future work is performed in the correct area.

Changing Student Home Rooms

Home Room/Group Builder

Select **Courses | Scheduling | Home Room/Group Builder**. Use this method of building home rooms or groups when students are to be evenly distributed in home rooms based on race, gender, lunch code, test scores or grades. This utility may also be used to separate students by ability; for example, place all *Above Average* students in one home room, all *Below Average* students in another home room, etc.



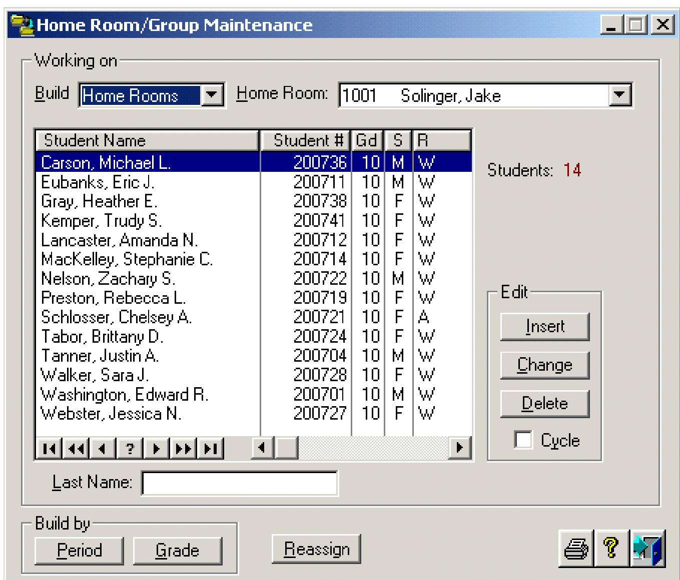
- **Build**: Use the drop-down arrow to select either *Home Rooms* or *Groups*.
- **Student Filter**: Select the student filter to use for building home rooms/groups.
- **First Home Room/Group**: Enter the number of the first home room/group to begin filling with students.
- **Students/Home Room/Group**: Enter the number of students to place in each home room/group.
- **Include Withdrawn**: Check to include withdrawn students.
- **Separate By Ability**: Use this option to segregate the students by ability. Ability will be determined by either Test Scores or Grades as selected under *Factors to Consider*.
- **Factors to Consider**: Check the criteria to consider when building home rooms. For example, a checkmark by *Gender* will ensure that each section will have an equal number of males and females. Check *Test Scores* to consider test scores or user files in home room building.
    - To separate by test scores, there must be a test(s) created under **Utilities | Transcripts | Tests** and scores entered on the **Testing** button on every student in the filter. Select *Test File* and click the **Ellipsis** button. Select the *Test*, *Field* and *Test Date* to be considered. Click the **Ellipsis** button to add the test to the list. Repeat as necessary. Click **OK** when finished. Enter the weight for tests in determining ability group.
    - To separate by user files, there must be a user file created under **Utilities | Students | User File Definition** using at least one number prompt. Information must be entered on each student under

    Students | Add/Edit Student Information. Click the number button in the lower right hand corner that corresponds with the user file created. Enter a number to signify the ability level for the student. For example, enter a 1 for above average students, a 2 for average students and a 3 for below average students. When building homerooms, check *Test Scores* and select *User File* from the drop-down list. Click the **Ellipsis** button. Select the user *File* and *Field*. Click the **Ellipsis** button to add to the user file list. Repeat as necessary. Click **OK** when finished. Enter the weight for user files in determining ability group.

  - Check *Grades* to consider student grades in home room building. Click the **Ellipsis** button. Enter the *Year, Grading Period* and *Grade Position*. Click the **Ellipsis** button to add to the grading periods list. If desired, select the course type to limit. Click the **Ellipsis** button to add to the course types list or leave blank to consider all. Repeat as necessary. Click **OK** when finished. Enter the *Grade Weight* to be used in determining ability groups.
  - **<u>Number of Levels</u>**: Enter the number of ability levels to create.
- Click **Apply** to begin assigning home rooms/groups based on the factors selected.

Home Room/Group Maintenance

Select **Courses | Scheduling | Home Room/Group Maintenance**. This utility allows scheduling of students into home rooms or student groups.



- **<u>Build</u>**: Use the drop-down list to choose whether to build home rooms or student groups, then select the home room or group to build.
- **<u>Insert</u>**: Click **Insert** to display a list from which students will be selected for inclusion in the home room or group to be built. Use this method to select students one at a time for this home room or group.
- **<u>Change</u> <u>or</u> <u>Delete</u>**: Select the student whose record is to be changed or deleted in the browse box, then click the appropriate button to perform the task.
- **<u>Build By</u>**: To create home rooms for groups of students, choose the order in which students are to be selected for inclusion (by *Period* or *Grade*).
  - **<u>Period</u>**: Select criteria to be used when creating home rooms, based upon the room in which students are located during a particular period. For example, if 1st period is the home room period for freshmen, select *Starting Grade 9, Ending Grade 9, Period 1, Term 1*.

- **Grade**: Select criteria to be used when creating home rooms based upon the grade level to which students belong. This is an alphabetical build.
  - Enter the *Grade* level to build, then press the *Tab* key. The number of students in that grade will appear below.
  - Use the spin box to select the *# of Sections* to create, then press the *Tab* key.
  - The number of *Students/Section* will automatically fill in based on the information already entered. Change this number, then press the *Tab* key, and the *# of Sections* listed above will change to fit the number of students per section.
  - Enter a *Starting Section* number. For example, to create three sections for Grade 12, the *Starting Section* might be *1200*; the next two sections will automatically be called *1201* and *1202*.
  - Click **Apply** to proceed.

- **Reassign**: Click this button to reassign all students listed to a new home room. Enter the *Current* and *New* home room numbers, then press the *Tab* key. When the *Old* and *New* numbers appear in the browse box, click **Apply** to process.
  - If using groups, enter the *Current Group* and the *New* home room number, then press the *Tab* key.
  - Check *Remove Groups* to remove the group(s) after moving to the new home room(s), then click **Apply** to process.

Home Room Scheduling

See the *STIOffice – Elementary Scheduling* Quick Reference Guide for complete details about this procedure.

Once Rollover has been performed and students are in the correct home rooms, home room models may be applied.