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Guide

# Scheduler

Win School®

Version 4.2

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Written by Tony Yip of Chancery Software Ltd.

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# Introducing Scheduler

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## Overview

Scheduler builds and maintains school and student timetables. Scheduler constructs classes as sections of courses, by building on the course, student, teacher, and room information established in School Setup and Details. The classes are populated with students and 1 or more teachers, and scheduled in rooms at times established in School Setup by year, monthly calendar, day, period, and block structure. Use Scheduler to manually or automatically build these timetables, but follow the procedures in the order given.

Scheduler accommodates up to:

6000 students	12 terms*
750 teachers	14 days per cycle
750 rooms	304 blocks per cycle*
1000 courses	42 periods per day
2000 classes	32,767 time records

\* Number of blocks multiplied by number of terms must not exceed 1400.

We strongly recommend that you use this guide in conjunction with the Win School System Administrator Guide, which contains scheduling tips, and the Win School Getting Started Guide, which contains concepts and a glossary.

## Using this Guide

This guide gives Scheduler information and procedures in these sections:

**Using Scheduler Features:** how to start Scheduler, how to view specific information, and how to use some of the major Scheduler features.

**Preparing to Schedule a New Year:** all of the setup work you do in other Win School modules in order to run Scheduler.

**Scheduling Your School:** all of the major tasks you do in Scheduler in the order you should do them to schedule a school year.

**Scheduling Fragmented Course Requests:** how to schedule term-based course requests for students taking a term of a course in a different year.

**Using Windows and Functions:** many of the windows and commands in Scheduler are described in detail, including when and how to use them.

**Printing Reports:** most of the Scheduler reports are described, including how to find them, what they include, and how to generate them.

**Troubleshooting:** tips and techniques to use if you have difficulties.

**Glossary:** explanations of terms used in Scheduler.

## Terminology

Some terminology is used in special ways in both Win School and this guide. See the Glossary for special terms.

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## Getting Technical Support

Chancery's support programs are available by subscription and include the below services.

Technical Support	<p>solves problems and answers questions when software doesn't produce the expected results.</p> <p>Monday to Friday, 5 am to 5 pm Pacific Time  phone: 1-800-688-9939  fax: 1-800-346-0643  email: techsupp@chancery.com  website: <a href="http://support.chancery.com">http://support.chancery.com</a></p>
Web support	<p>Chancery's website includes a searchable knowledge base with frequently asked questions, tips, and troubleshooting, as well as support forums for users to share experience and knowledge. Web tutorials are available on an annual subscription basis.</p>
Software updates	<p>releases of new versions with improved functions and software fixes. Updates are provided free of charge for 3 months from your date of purchase and are included in the subscription to Chancery Support Programs.</p>

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## Providing Feedback

To improve the quality of your documentation, we would like your comments regarding this guide. Email comments to Chancery's User Education department at [user\\_docs@chancery.com](mailto:user_docs@chancery.com).

# Using Scheduler Features

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## Overview

To start using Scheduler, you need to know some fundamentals: how to start Scheduler, and where features are located.

You also need to decide whether you will use students' Fragmented Course Requests. If you use Fragmented (term-based) Course Requests, read "Scheduling Fragmented Course Requests" on page 71 in addition to the other sections before scheduling your school.

Class rosters created in Scheduler can be used by other Win School modules. They can display class rosters and when and where classes meet.

- Query displays where students and teachers are scheduled at any time of any day
- Period attendance can be recorded by class
- Attendance can be scanned by an optical scanner
- Class attendance can be loaded into Report Cards
- eClass Grades uses the rosters built in Scheduler

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## Starting Scheduler

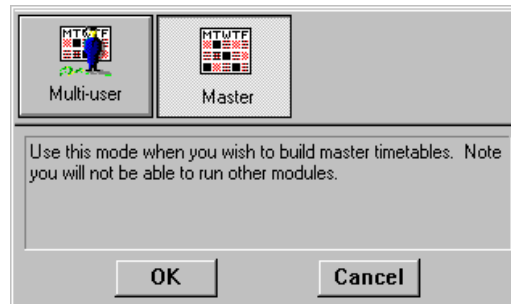
When you start Scheduler, you choose the mode to start it:

**Master:** While you are using Scheduler, no one else can run it. No other modules can run while you are using Scheduler. All features are available.

Choose Master mode to build master timetables.

**Multi-User:** Many users can run Scheduler at the same time. Details, Attendance, and Report Cards can also run. Other modules are not available. You can view, but not edit, the School Timetable.

Choose Multi-User mode to edit student timetables, and let other modules run.



**To check which start method you used:**

- Click the Scheduler Information Icon in the title bar of the Scheduler Main window.

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## Archiving the Data Folder / Saving Scheduling Runs

Before making changes, make a copy of your data folder. Either back up the data folder using your normal backup procedure or duplicate it in Windows®. The copy is an archive. Then make changes. If the result is a better timetable, you can delete the archived data. But if you don't like the result, you can always replace it with the archived data.

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## Using Scheduler Features

The Main window is always open when you are running Scheduler. Press F5 to bring it to the front.

Click the Information icon to see what is going on in your current session. A student information section is added to the bottom of the information dialog if you open it from a Student Timetable or Student Requests window.

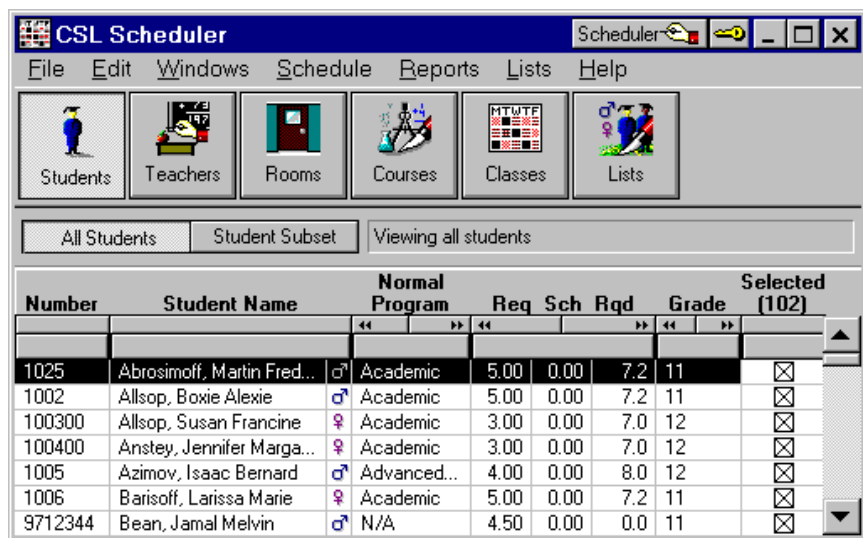
Use the windows in Scheduler as you would in any other module.

## Using Main Window Views

The 7 main views in Scheduler include 2 types of student grouping: all students, or subsets of students.

View	Left-Double-Click an Item	Right-Double-Click an Item
Students	Opens the student timetable window	Opens the student requests window
Teachers	Opens the teacher timetable window	Generates a subset of students who have the highlighted teacher as a counselor
Rooms	Opens the room timetable window	Generates a subset of students who have that room as a homeroom
Courses	Opens the sections window, with the highlighted course displayed	Generates a subset of students who have requests for the highlighted course

View	Left-Double-Click an Item	Right-Double-Click an Item
Classes	Opens the school timetable window, with the highlighted class displayed	Generates a student subset of the class roster for the highlighted class
Lists	Not applicable	Generates a student subset based on ethnic category, gender, grade, home language, normal program, school, special program, student group or track



### Other Notes

Classes are scheduled, not courses.

Courses are created in Course Details. When students request the courses they want to take, they are assigned to sections of courses, called either sections or classes. A course can have none, 1, or many classes, identified as a class by course name and section number.

In Scheduler, section and class mean the same thing, except for class rank which means the rank of a student within the grade level.

### Using Students View

You can use VCR buttons in the third and fourth columns in the Students Main window to display Req Sch Rqd:

**Req:** Scheduling Credit total for the courses the student has requested (not including Alternate requests).

**Sch:** Scheduling Credit total for the classes in which the student is scheduled.

**Rqd:** number of credits required for the Normal program at the student grade level.

If students are missing from the Student window, they might be inactive or assigned to Grade N/A. Preferences determine the student list. For more information, see “Preferences – Scheduler” on page 88.

If you are using Fragmented (term-based) Course Requests, these columns show the requested terms. For more information, see “Scheduling Fragmented Course Requests” on page 71.

## Using Student Subsets

The information bar in the window heading describes the set of students being viewed. The total for a class roster subset always includes inactive students and those assigned to grade N/A. Preferences determine the student list.

Commands that require selected students process whichever student list you viewed most recently in the Main window.

Student Requests and Student Timetable windows allow you to switch to the previous or next student in whichever student list you viewed most recently in the Main window.

In the Student Timetable window, use the F3 and F4 keys to move forward and back through student records for either main or subset lists.

To create a Student Subset, either right-double-click an item in another view, or select a command from the Lists menu.

When you generate a Student Subset, Win School replaces the existing Student Subset with the new one.

<b>To generate this Student Subset from the Students view:</b>	<b>Choose this option from the Lists Menu in the Students view:</b>	<b>Or, right-double-click an item in this view:</b>
Students selected in the current window	Selected Students	
Students with a teacher as counselor	Counselor’s Students	Teachers view
Students in a homeroom	Homeroom Roster	Rooms view
Students who have first-choice (not alternate) requests for a course	Request List	Courses view
Students who have first-choice (not alternate) requests for a course, who are not scheduled	Wait List	
Students scheduled for a class	Class Roster	Classes view
Students in a grade	Grade Roster	Lists view Grades category

To generate this Student Subset from the Students view:	Choose this option from the Lists Menu in the Students view:	Or, right-double-click an item in this view:
Students who fail to meet prerequisite, co-requisite, or gender requirements of requested courses	Request Problems	
Students who entered or left a class on the currently selected transfer date	Changed	
Students who fail to meet prerequisite, co-requisite, or gender requirements of their scheduled courses	Timetable Problems	
Students who have not requested enough credits for program requirements	Requested < Required	
Students not scheduled for as many credits as they requested	Scheduled < Requested	
Students not scheduled for as many credits as their program requires	Scheduled < Required	
Students classified by ethnic category, gender, home language, normal program, school, special program, student group or track		Lists view. Select a category

## Using Lists View

You can use the Lists view to create a Student Subset for a category of students you choose.

### To generate a Student Subset:

- In Lists view, choose a category of students from the popup menu.  
Category values are defined in the School Setup module from the Student/General selection in the School menu. The categories are:
 

Ethnic	Gender
Grades	Home languages
Normal program	School name
Special program	Student groups
Track	
- Right-double-click a category value. The student records with that value are displayed in a Student Subset view.

# Preparing to Schedule a New Year

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## Overview

Perform the scheduling procedures in the order described.



Complete all procedures in the given order. *Do not* go on to the next procedure until you have completed the previous one. Each step depends on the previous step.

As you schedule, expect to go back to earlier steps to change information. But when you do, work through all the steps again, don't jump to where you left off.

If you want to use Fragmented course requests, read “Scheduling Fragmented Course Requests” on page 71 in addition to the other sections before scheduling your school.

## Preparing to Schedule the Next Year

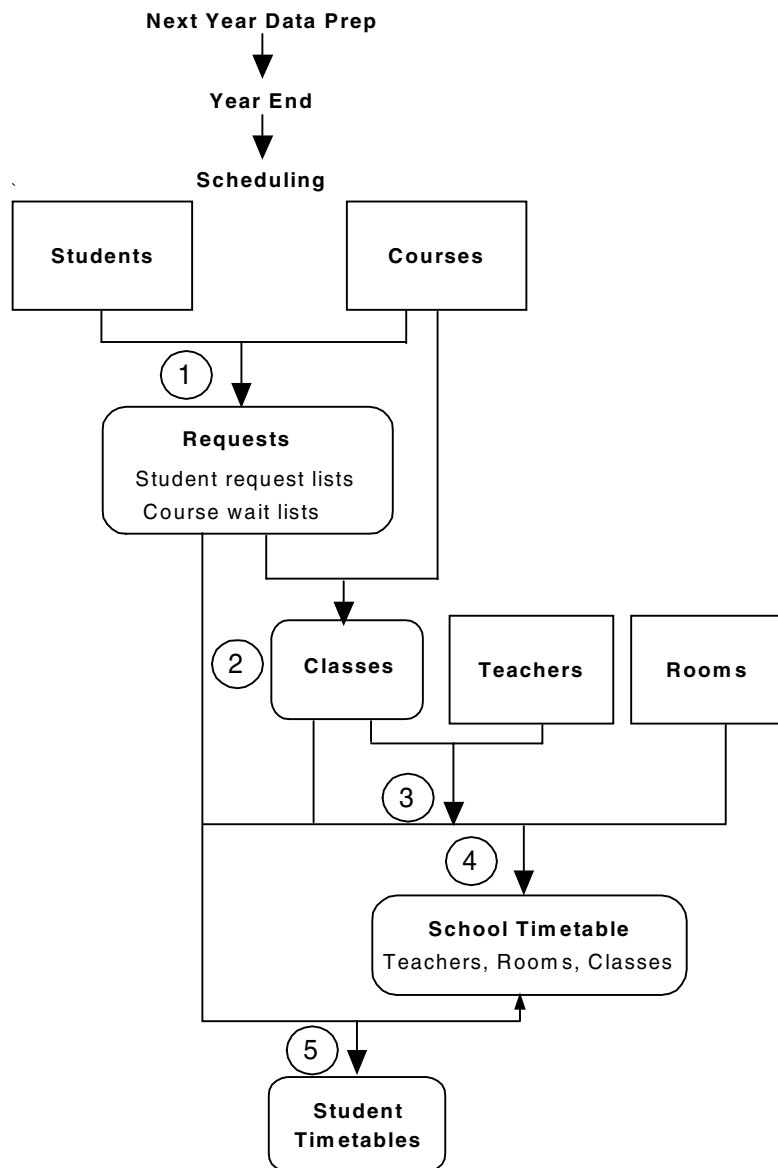
### To prepare current-year data for next year:

- 1 Create a Next Year data folder, as described in “Setting Up the Next School Year” in the Win School System Administrator Guide.
- 2 Set up data options for next year in School Setup and Details in the next year database. See the Win School School Setup and Details guides.
- 3 Run the Year End process, described in the Win School System Administrator Guide.

## Scheduling a New Year

### To schedule a new school year:

- 1 Enter student course requests.
- 2 Create classes. Either manually or automatically create enough classes each term to satisfy course requests.
- 3 Load teachers. To automatically schedule, check that you have enough teachers loaded for your classes.
- 4 Create school timetable. Schedule classes, teachers, and rooms.
- 5 Create student timetables. Schedule students into their classes.
- 6 Start the school year.
- 7 Maintain schedules during the school year.



### Using Other Procedures

Some schools also use other Scheduler features.

To	Use
schedule parts of a course in different terms or different years	Fragmented Course Requests
schedule more than 1 class in 1 room	Class Combining
schedule second teachers, and teaching aides	Assign Aides
schedule groups of students and groups of teachers	Clusters and Teams

To	Use
schedule classes or students from other schools	Working with Other Schools
scramble periods so that classes are not taught in the same period each day	Scramble Periods

## Changing from Report Cards to Scheduler

If you created classes in Report Cards using Edit Classes, you cannot run Scheduler using the same data. Create a new data folder using Next Year Prep from the Shell, then start scheduling from scratch.

Refer to the Win School System Administrator Guide for more information on Next Year Prep.

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## Preparing Data for the Next Year

Before starting to schedule the next year, complete a series of tasks to prepare data for the next school year. Each school year requires a separate data folder. This data folder can be on the same server or a different server.

If you are running Win School multi-user on an NT server using TCP/IP, you can set up multiple servers, one for current year data, and one for next year's data. For more information, see the System Administrator Guide.

Use the following procedures in order: to prepare data for the next year and create a next year data folder. Then run Next Year Prep.

See also "Setting Up the Next School Year" in the Win School System Administrator Guide.

If you used Report Cards and not Scheduler to create classes, you will not be able to use data from the Historical file with Scheduler in preparing data for the next year. The 2 data sets are not compatible.

### To prepare data for the next year and create a data folder for next year:

- 1 Update and check information in Details and Report Cards to make data as current as possible for preparation of data for the next school year.
- 2 If you schedule by class rank in the Report Cards module, run Class Rank from the Edit menu. See "Generating Class Rank and Honor Roll" in the Win School System Administrator Guide.
- 3 Write down the data path for the current year's data. This information is displayed in the Win School Shell. Usually, the data path is something like C:\WINSCHL\DATA.
- 4 Quit the Shell and back up your current year's data.
- 5 If you are using the multi-user version of Win School, log onto the Win School server as the administrator.

If you are using multiple NT servers, install next year's server. See "Setting Up Multiple Win School NT Servers" in the Win School System Administrator Guide.

If you are using the single-user version of Win School, create a directory for next year's database that you can access using the computer running Win School. This new directory should follow the same path you wrote down in step 2 except for a different name for the last part of the path. The last part of the path is the name of the current year's data directory; therefore, you must type a name for your next year's data directory, a name which references the school year. For example, use "DATA9899" to name the 1998-1999 school year's data directory.

- 6 Write down the information of next year's directory as you need it when you run Next Year Prep and to access next year's data. If you are using multiple servers, write down the server information including the server IP address and port number.

**To run Next Year Prep:**

- 1 Start the Win School Shell.
- 2 From the Shell menu, choose Next Year Prep.
- 3 In the Select Next Year's Directory dialog, double-click next year's data folder so that it is open. Click OK.
- 4 Win School creates next year's database and displays the Next Year Prep dialog. Specify the location of the Win School icon to access next year's database. Click OK.



- 5 The folder with next year's database icon is opened, and a message informs you that Next Year Prep is complete.
- 6 Click OK.
- 7 Quit the Win School Shell.

After running Next Year Prep, we recommend you do not delete students from the current year's data. Similarly, add new courses, students, or teachers pertaining to next year in the next year database. If you need to add any students, teachers, or courses to the current year's database, you also have to add that information to the next year's database.

## Preparing Year End

When the current school year ends, run "Current Year End" and "Current/Next Year Merge" in the Utilities module. This updates the Next Year Data with changes to student information made to the current-year data since running Next Year Prep.

Use only the Next Year Data folder for the following procedures. Use the checklist at the start of each procedure for each module, in the order given, to change data for the coming school year.

## Preparing School Setup

In the Next Year Data folder, complete the following data fields for the year to be scheduled. The School Year and Set Scheduler Terms set the year.

### School menu

School Year  
Define Grade Levels  
Transfer Recording OFF

### Rooms menu

Room Types  
Room Setup  
Room Clone

### Students - General menu

Normal Programs  
Special Programs

### Scheduler menu

Set Scheduler Terms  
Timetable Structure  
Teacher Course Load  
Reservation Labels  
Period Labels  
Block Labels  
Scheduling Drop Date  
Scheduling Aide Types

For Timetable Structure in the Scheduler menu: if you change the number of terms in the Set Scheduler Terms dialog or decrease the number of blocks in the Timetable Structure dialog, the only scheduling data you can access is student course requests. You will have to create new school and student timetables.

## Preparing Course Details

In the Next Year Data folder, Details module, Courses view, check each of the following data fields and make changes if necessary.

### General tab

Course No.  
Course Name  
Grade Level  
Department  
Keep History

### Periods tab

Usable blocks/periods for this course  
No. of unique block letters  
Spread over how many days  
Periods per day  
Same periods each day  
Consecutive periods  
All sections in the same blocks

### Lists tab

Prerequisites  
Co-requisites  
Rooms  
Required Programs  
Requested Programs

### Scheduler tab

Course length (in terms)  
Terms are consecutive  
Course can start in term(s)  
Course can be taught in term(s)  
Teacher Required  
Maximum class size  
Minimum class size  
Student mix  
EFT  
Preceding Course  
Allow Combining \*  
Room Required  
Scheduling Credits  
Student Clusters  
Use in Scheduler  
Aide Type  
District Use Only

\* To allow 1 teacher to teach more than 1 class in 1 period, use Allow Combining.

To make Create Timetable schedule courses into the same period, or in consecutive periods, choose Following Triplets/Linked Groups from the Details menu. For more information, see “Choose Sections According to Linked Groups and Following Triplets” on page 78.

## Preparing Teacher Details

In the Next Year Data folder, Details module, Teachers view, complete the following data fields.

### Personal tab

Teacher number  
Name  
Department  
Homeroom Number  
Counselor

### Scheduler tab

Course preferences  
Room preferences  
Scheduling teacher type  
Aide Type  
Maximum number of blocks teacher can be scheduled for

Clone those teachers who will be teaching more than 1 class at once in different rooms, and in Course Details, use Allow Class Combining in the Scheduler tab to schedule teachers to teach more than 1 class at once in the same room. For more information on class combining, see “Scheduling Simultaneous Classes in the Same Room (Class Combining)” on page 29.

If you want to assign teaching teams or assign teachers to clustered classes, set up Clusters & Teams in the Schedule menu, then in the Details module, use Team Teaching from the Details menu to assign teaching teams.

## Preparing Student Details

In the Next Year Data folder, Details module, Students view, complete the following data fields.

### Personal tab

Student No.  
Name  
Gender  
Grade Level  
Homeroom Number

### Groups tab

Normal program  
Special program  
Counselor

# Scheduling Your School

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## Overview

The process of scheduling a school for the new school year consists of 7 steps.

### To schedule a new school year:

- 1 Enter student course requests.
- 2 Create classes. Either manually or automatically create enough classes each term to satisfy course requests.
- 3 Load teachers. To automatically schedule, check that you have enough teachers loaded for your classes.
- 4 Create school timetable. Schedule classes, teachers, and rooms.
- 5 Create student timetables. Schedule students into their classes.
- 6 Start the school year.
- 7 Maintain schedules during the school year.

Scheduler works through the scheduling process in order of most-difficult-to-schedule, to least-difficult.

### General order of scheduling:

- 1 Special Courses such as:
  - Courses with 1 section.
  - Courses using team teaching.
  - Clusters where groups of students move together to classes.
  - Class Combining such as Spanish 11 and 12 in the same room with the same teacher.
  - Linked Groups and Following Triplets where students stay together but the teacher and room may change. For example: Biology and Biology Lab, or Math 11a, 11b, 11c where algebra, geometry, and trigonometry may be taught by different teachers.
- 2 Courses with more than 1 section.

Use the lists and reports from the Reports and Lists menus in Scheduler to check progress of scheduling as suggested at appropriate points in these procedures. For more information on the purposes and contents of reports, see “Printing Reports” on page 96.

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## Step 1: Entering Student Requests

Win School treats all scheduling as ‘by-request’ for both required and elective courses. Usually, to save time, schools schedule required courses automatically for all students. Win School treats required courses as being required by students in a specific grade level and normal program. You set grade level and program in the Details module.

Electives and required courses that are requested by students but not required for program completion, can be either automatically or manually scheduled, or a mix.

If you schedule your school automatically, the first step is to enter student course requests. Use the procedures and steps in the order described in each sub-section. Skip procedures that don’t apply to your situation.

### Assigning Required Courses

Choose Assign Requests from the Schedule menu to assign each student a request for the required courses in her or his grade level and program. You set up required courses in Details, as Requested and Required for a specific program.

Win School looks for courses in the right program, at the required grade level, and other requirements such as gender, then gives the student a request for each required course.

If you assign requests more than once, students will have duplicate requests. If you want to assign Fragmented, or term-based, course requests, you must remove duplicate requests first. To remove duplicate requests, see “Removing Duplicate Requests” on page 20.

#### To assign requests:

- 1 In the Main window, select students.
- 2 From the Schedule menu, choose Assign Requests.
- 3 A dialog asks you to confirm that you want to assign requests.

### Entering Non-Required Requests

After you assign requests for required courses, enter requests for non-required courses, also called electives.

#### Four methods to assign requests for courses:

- Scanning: For information on Scanning, see the Scanning and ASCII Transfer Guide.
- ASCII Transfer: If you store requests in another program, use ASCII Transfer to enter them into Win School. For information on ASCII Transfer, see the Scanning and ASCII Transfer Guide.

- **Editing Requests:** Manually edit requests in Scheduler. See “Adding Requests” on page 17 and “Deleting Requests” on page 18.
- **Pasting Requests:** In Scheduler, copy requests to 1 or more students. See “Pasting Requests” on page 19.

### Using the Student Requests Window

#### To display the Student Requests window:

- From the Windows menu, choose Student Requests.

OR

In the Students view, right-double-click a student.

The top half of the Student Requests window lists all courses in the same order as in the Main Scheduler window.

The Status column reports course requirements in relation to the student currently displayed in the Student Requests window. The column may contain the following information:

“Required” or “Elective” is displayed at the left. A course is required if:

- the program for the student is in the Required Programs list of the Course Details Lists dialog—Required Programs
- the course and student are in the same grade
- the student meets any gender requirements

Otherwise, the course is elective for the student.

Gender appears if the student is the wrong gender for the course.

**CoReq:** Course Name indicates that the student has not requested the specific course, which is co-requisite for the course in the Course Name column. If co-requisites are not required for the course, or if the student has requested them all, CoReq... does not display.

**PreReq:** Course Name indicates that the student has not requested the specified course, which is prerequisite to the course in the Course Name column. If prerequisites are not required, or if the student has requested them all, PreReq... does not display.

If a student has both gender and prerequisite/co-requisite problems with a particular course, gender takes priority and is displayed in the Status column. Reported gender, prerequisite, or co-requisite problems are only alerts that a problem might exist. You can still assign the request as usual.

### Adding Requests

Add requests in the Student Requests window. The order of entering requests is important.

**To add a course request:**

1 In the Students view, right-double-click a student to open the Student Requests window.

Use F3 and F4 to move back and forth between students.

Courses are added above the highlighted line in the Requests list.

2 In the upper list:

- to request a first-choice, left-double-click a course
- to request a linked alternate, highlight a course in the Requests list, then right-double-click a course in the upper list
- to add a global alternate, put the cursor anywhere in the Global Alternates list and left-double-click a course in the upper list

For information on linked alternates and global alternates, see “Use Alternates” on page 80 and “Use Backtracking” on page 80.

The screenshot shows the 'Student Requests' window for student 11 - Abrosimoff, Martin Frederici. The window title bar includes 'Scheduler' and standard window controls. The main area contains a table with the following data:

Course Number	Course Name	Status	Requests
55	Adv. Spanish	Elective	0
111	Algebra 11	Required	27
222	Algebra 12	Elective	38
333	Biology 11	Required	0
444	Biology 12	Elective	0
555	Biology Lab 11	Required	0
666	Bookkeeping 11	Elective	20
119	Calculus 12	Elective	38
777	Chemistry 11	Required	6
888	Chemistry 12	Elective	0
10	Computer Science 11	Required	39
11	Drafting 12	Elective	15

Below the main table are two smaller tables:

Requests	Credits	Linked Alternates	Credits
Algebra 11	1.000	Math 11	1.000
Computer Science 11	0.500		
English 11	1.000		
History 11	1.000		
Physical Education 11	1.000		
Typing 11	0.500	Shorthand 11	0.500

Global Alternates	Credits
English 11	1.000

**Deleting Requests**

There are 3 ways you can delete requests. You can select students and delete all their course requests, you can select students and courses and delete the selected courses from the selected students, and finally, you can delete 1 request for 1 student.

**To delete a single request:**

- Highlight the course in the Requests list and press Delete.

**To delete all requests from selected students:**

- 1 Select students in the Main window.
- 2 From the Schedule menu, choose Change Students, then select the Clear Requests checkbox to clear first choice requests.  
To clear alternate requests, select the Clear Alternates checkbox.
- 3 Click Perform.

**To delete selected course requests from selected students:**

- 1 Select courses in the Courses view.
- 2 From the Schedule menu, choose Clear.
- 3 In the Clear dialog, select the “Clear selected courses from student request lists” radio button.  
To make the linked requests of alternate requests into primary requests, select the “Replace first-choice request with its linked alternate” checkbox.
- 4 Click Clear to begin removing requests.

**Pasting Requests**

Add requests to 1 or more request lists by pasting. You can copy 1 or more request lists to 1 or more students. Pasting a list replaces an existing list. Use this procedure when you have students taking the same courses.

**To paste courses or a request list to 1 student:**

- 1 In the Courses view, highlight the course.  
OR  
For a Request List, in the Students or Student Subset view, highlight the source student.
- 2 From the Edit menu, choose Copy.  
OR  
For a Request List, choose Copy from the Edit menu, then select Requests. Click OK.  
To display clipboard contents, click the Information icon in the title bar or press F2.
- 3 Highlight the destination name in Students view.
- 4 From the Edit menu, choose Paste.

**To paste requests to several students (multi-pasting):**

- 1 In the Courses view, highlight the course.  
OR  
For a Request List, in the Students or Student Subset view, highlight the source student.
- 2 From the Edit menu, choose Copy.  
OR  
For a Request List, choose Copy from the Edit menu, then select Requests. Click OK.  
To display clipboard contents, click the Information icon in the title bar or press F2.
- 3 Select the destination students' checkboxes in the Main window.
- 4 From the Edit menu, choose Multi-Paste.
- 5 Click OK.

**Adding Co-Requisites**

Co-requisites are defined in Course Details.

**To add co-requisite requests:**

- 1 Select students in the Main window.
- 2 From the Schedule menu, choose Change Students.
- 3 Select the Add Co-requisites checkbox.
- 4 Click Perform.

**Removing Duplicate Requests**

To ensure students have not requested a course more than once, delete duplicate requests.

If you want to assign Fragmented course requests, you must remove duplicate requests before assigning students and assigning Fragmented course requests.

**To delete duplicate requests:**

- 1 Select students in the Main window.
- 2 From the Schedule menu, choose Change Students.
- 3 Select the Remove Duplicate Requests checkbox.
- 4 Click Perform.

## Monitoring the Course Request Process

To track progress when entering course requests, you can use different views in the Scheduler window, use VCR buttons to view different information, and work on only the students in the subset.

### Viewing Required and Requested Totals

In the Students Main window, use the VCR buttons in the third or fourth column to display “Req Sch Rqd.”

- Req is the total of the Scheduler Credits for the student’s first-choice requests.
- Sch shows the number of requests currently scheduled.
- Rqd is the number of credits required for the Normal program and grade level of that student.

These columns reflect the requested terms. If you are using Fragmented (term-based) Course Requests, and a student requested 2 terms of a 2 term course, but can only be scheduled into 1 term, the Sch column shows half the credit for that request.

Number	Student Name	Normal Program	Req	Sch	Rqd	Grade	Selected (102)
1025	Abrosimoff, Martin Fred...	♂ Academic	5.00	0.00	7.2	11	<input checked="" type="checkbox"/>
1002	Allsop, Boxie Alexie	♂ Academic	5.00	0.00	7.2	11	<input checked="" type="checkbox"/>
100300	Allsop, Susan Francine	♀ Academic	3.00	0.00	7.0	12	<input checked="" type="checkbox"/>
100400	Anstey, Jennifer Marga...	♀ Academic	3.00	0.00	7.0	12	<input checked="" type="checkbox"/>
1005	Azimov, Isaac Bernard	♂ Advanced...	4.00	0.00	8.0	12	<input checked="" type="checkbox"/>
1006	Barisoff, Larissa Marie	♀ Academic	5.00	0.00	7.2	11	<input checked="" type="checkbox"/>
9712344	Bean, Jamal Melvin	♂ N/A	4.50	0.00	0.0	11	<input checked="" type="checkbox"/>

### To generate a student subset for insufficient requests to meet program credit requirements:

- 1 From the Lists menu, choose Requested < Required.
- 2 The view shows the Student Subset with the number of students that meet the criterion.

To select individual students, use the checkboxes, or, to select all students, shift-click an unselected checkbox.

To print the selected students, choose Print from the System menu.

You can use the same procedure to generate subsets of students with unscheduled requests, and students whose scheduled requests are less than required.

**To generate a student subset for missing prerequisites, co-requisites, or gender requirements:**

- 1 From the Lists menu, choose Request Problems.
- 2 In the Request Problems dialog, select the checkbox for problems with Prerequisites, Co-requisites, and/or Gender Restrictions. Click OK.
- 3 The view shows the Student Subset with the number of students that meet the criteria.

To select individual students, use the checkboxes, or, to select all students, shift-click an unselected checkbox.

To print the selected students, choose Print from the System menu.

**Viewing Requests by Course**

In the Courses Main window, use the VCR buttons in the third or fourth column to display the information most useful for your stage of scheduling.

Display Requests in third or fourth column, for the number of first-choice requests for that course.

Course Number	Course Name	Requests	Maximum Class Size	Selected (0)
55	Adv. Spanish	1	30	<input type="checkbox"/>
111	Algebra 11	28	28	<input type="checkbox"/>
222	Algebra 12	38	30	<input type="checkbox"/>
333	Biology 11	2	25	<input type="checkbox"/>
444	Biology 12	1	30	<input type="checkbox"/>

**To generate a student subset for first-choice requests for that course (scheduled or not):**

- 1 In the Course Main window, right-double-click a course.
- 2 The view changes to the Students Main window, and shows the Student Subset with the number of students that meet the criterion.

To select individual students, use the checkboxes, or, to select all students, shift-click an unselected checkbox.

To print the selected students, choose Print from the System menu.

**To generate a Student Subset for requests for that course which have not yet been filled:**

- 1 In the Course Main window, highlight a course and choose Wait List from the Lists menu.
- 2 The view changes to the Students Main window, and shows the Student Subset with the number of students that meet the criterion.

To select individual students, use the checkboxes, or, to select all students, shift-click an unselected checkbox.

To print the selected students, choose Print from the System menu.

**Generating Reports about Requests**

Course Request Tally Report. For selected courses, the Course Request Tally report from the Reports menu displays the total number of requests by gender and by grade.

Student Requests Report. For selected students, the Student Requests report from the Reports menu lists name, grade, student number, and requests, including required or elective, and prerequisite, co-requisite, and gender requirements.

Wait Lists Report. For selected courses, the Wait Lists report from the Reports menu creates a numbered list of students waiting to be scheduled, the total number of requests for each course and the percentage of requests filled.

Check the Reports menu for the report you need. See “Printing Reports” on page 96 for more information.

**Working with Other Schools**

If you don't need to schedule classes at other schools, or schedule students from other schools, skip this section.

If students from your school attend other schools or if students from other schools attend your school, use this section to schedule their information differently. Enter classes from other schools into your school timetable manually or by importing them using Data Transfer from the File menu.

Schedule students into classes taught in other schools:

- manually
- with Assign Students from the Schedule menu
- use Data Transfer from the File menu to import student schedules from another school your students attend, and to transfer those classes into student timetables in your database

If you use District Data Integrator, or another application for data transfer, please refer to the appropriate guide for information.

**Considerations:**

- Manually schedule students into any classes they need that aren't already requested. Build the rest of your student timetables normally.
- Before printing timetables, select "Show All District Items" in Preferences from the Edit menu. The status of the Show All District Items setting also appears in the Scheduler Information dialog.
- Use Reservation Labels such as "Off Campus" when students are not scheduled at your school. See the School Setup Guide for setting up Scheduler reservation labels.

Two options that work only if schools run identical schedules:

- If you can, use Data Transfer from the File menu to import the timetables of students taking classes at other schools. Those timetables contain only the classes at the other schools. The rest of the timetable is blank. Fill with Assign Students.
- If you schedule students from other schools into classes at your school, you can export their timetables with Data Transfer from the File menu.

**To schedule classes or students from other schools:**

- 1 From the other school, find out what classes your students will be taking, when they are taught, in which rooms, and with which teachers.
- 2 In School Setup, enter the other schools in School Names from the School menu.

In the Room Setup from the Rooms menu, enter the rooms in the other schools that those courses are taught in. Correct the School ID and select Yes for Scheduler.

- 3 If courses have not been entered, enter all necessary course information in Course Details as you did for your own courses.

In the Scheduler tab, if the course is not taught in your school, select Yes for Use in Scheduler and Yes for District Use Only.

In the Periods tab, enter only the No. of unique blocks.

In the Lists tab, enter all information except Room Preferences.

- 4 In Teacher Details, enter the teachers from other schools. Select the correct School ID in the Personal tab.

In the Scheduler tab, enter only Teacher as the Scheduling Teacher Type.

- 5 In Student Details, enter the students from other schools attending classes at your school. Enter the correct Home School in the Enrollment tab.

- 6 In Scheduler, choose Preferences from the Edit menu, then choose Scheduler from the Edit menu. Select Show All District Items. This determines whether rooms, courses, classes, and teachers from other schools appear in Scheduler. Students from other schools always appear.

- 7 If you have determined which sections these students will take or if you will import timetables for students attending classes in other schools, don't enter requests for those courses. Schedule them manually.

If you will schedule with Assign Students, enter student requests for students from other schools who take classes in your school and for students from your school taking classes in other schools.

- 8 Enter the rest of the student requests, set sections, and load teachers normally. Create Timetable will not schedule classes into rooms in other schools. So immediately before running Create Timetable, either manually schedule or use Data Transfer from the File menu to import schedules for all classes taught in rooms in other schools, if master schedules are identical.
- 9 Lock those classes and create your school timetable normally.

### **Displaying Other School's Data**

Scheduler Preferences control the display of data for other schools.

From the Edit menu, choose Preferences, then choose Scheduler from the Edit menu. Select Show All District Items to display:

- teachers assigned to other schools in Details
- rooms assigned to other schools in School Setup
- courses that have Yes entered in their District Use Only fields in the Scheduler tab in Details
- classes that are either sections of District Use Only courses or that are scheduled into rooms in other schools

Student records from other schools are always displayed. To display school names in the Students Main window, select in the third or fourth column.

---

## **Step 2: Setting Sections**

When you have entered all course requests, you are ready to create classes, also called sections, for the courses at your school.

If you have run New Schedule from the Schedule menu, you don't have any sections. Otherwise sections from the previous year are retained. You can use the existing sections or delete them and create new sections.

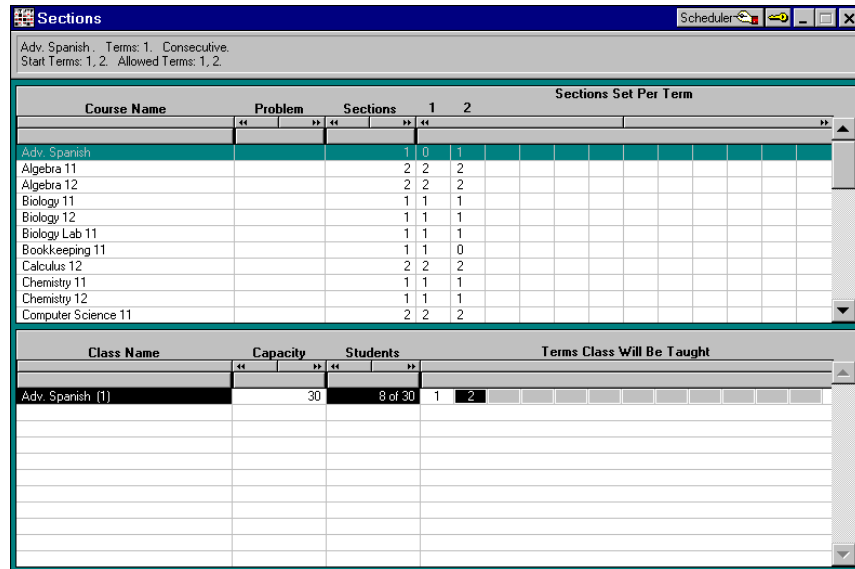
### **Automatically Creating Sections**

To automatically create sections for your courses, choose Set Sections from the Schedule menu. New sections are created based on:

- the number of requests for each course
- the average of the minimum and maximum class sizes set in Course Details

When the process is complete, the Sections window appears.

If you use Fragmented course requests, you should check that the correct number of sections have been created for each term. See “Scheduling Fragmented Course Requests” on page 71.



When sections already exist, you cannot use Set Sections. To access your Sections window to view or edit its contents, choose Sections from the Windows menu.

Use the VCR buttons in the top right area to choose either “Sections Set Per Term” or “Course Request Totals Per Term.”

If you make changes to student requests or class size limits in Course Details, you can manually adjust class information in the Sections window.

After running Set Sections, you might need to edit the number of sections created, the term in which each section is taught, or the section number assigned.

### Examining the Set Sections Results

The Sections window appears after your sections have been created. Check each course and each term to be sure that there are enough sections based on its requests.

This window displays course information in the top half, and class information for the highlighted course in the bottom half.

Use the VCR buttons in the second and third columns to display problems, scheduling, requests, and other information.

Use the VCR buttons in the fourth column to display Sections Set Per Term or Course Request Totals Per Term.

## Automatically Resetting Sections

If you make changes to student requests or to class size limits in Course Details, you can either manually edit class information in the Set Sections window or rebuild all of your sections.

### To automatically reset all sections:

- From the Schedule menu, choose New Schedule.

Aside from student requests, existing scheduling data will be lost.

## Editing Section Information

After setting sections, you might have to adjust the number of classes, the terms in which they are taught, or section numbering.

You will have to create classes by adding them if you are manually scheduling your school without using course requests. Every course must have at least 1 section.

## Adding and Deleting Classes

To adjust the number of sections, either add or delete classes.

Classes can be scheduled only into the terms selected in this window. Create Timetables and manual editing cannot override these settings.

### To add classes:

- 1 In the top list of the Sections window, double-click the course.

The number of terms and the sections must agree with the setup in Course Details.

Click the Information bar or press F2 for information about the highlighted course, including the course length (in terms), whether terms must be consecutive, the terms in which the course can start, and when it can be taught.

- 2 In the second and third columns of the Course Name window, use VCR buttons to select information:

- Ratio in the top list displays the average number of students per section, calculated as number of requests, divided by total number of sections.
- Capacity in the bottom list indicates the smaller of the maximum class size and, if the class has been scheduled, the room capacity. To override capacity, type a new number.

- 3 Double-click a course, to add a class (section) in the lower list.

Class names are displayed in color until you highlight the number of terms defined for the course in Course Details.

Course and Class names appear in color if there is any conflict.

- 4 Change column information with the VCR buttons to check your progress.  
To check for problems, select Problem in the second or third column.
- 5 Click a numbered Term to select or deselect it.  
Shift-click to select or deselect more than 1 term.

**To delete a class:**

- Highlight the class in the bottom list, then press Delete.

Be careful about which section number you delete.

**To edit section numbers:**

- 1 In the lower list, display Section in column 2 or 3 to list section numbers.
- 2 In the Section column, highlight the section number and edit it.  
You cannot use duplicate section numbers. New sections are automatically given the next higher number.

**Editing Terms when a Class is Taught**

You can change the terms in which a class is taught.

If you are automatically scheduling, check that you set up the correct information. The term selections you make constrain how Create Timetable schedules your school.

If you are manually scheduling your school, set up this information for all your classes.

**Monitoring the Set Sections Process**

To track progress in setting sections, use these Scheduler features.

**Viewing Course Sections and Terms**

Display Sections in Column 3 or 4 to show the number of sections and terms for each course. Choose Print from the System menu to print selected courses.

**Viewing the Classes Main Window**

This window lists all the classes and their section numbers. Choose Print from the System menu to print selected classes.

**Generating the Resource Check Report**

For selected courses, the Resource Check report from the Reports/Algorithm menu prints the number of classes, room preferences,

available blocks, number of days and terms, and the minimum and maximum class sizes used by Set Sections.

### **Generating the Equivalent Full Time Report**

The Equivalent Full Time (EFT) report from the Reports/Special menu lists courses by department. For each course, it lists the number of sections, the EFT per section and the EFT required to teach all sections.

For each department, it lists the total EFT required.

At the end of the report, the total number of classes and the total EFT required are listed.

This report is useful in determining teacher distribution in the Load Teachers window. Set the EFT values in Course Details.

### **Scheduling Simultaneous Classes in the Same Room (Class Combining)**

Use Class Combining from the Schedule menu to schedule more than 1 class in 1 room at the same time. For example Spanish 11 and 12 might be taught at the same time in the same room by the same teacher.

#### **For each course that could be combined with another:**

- 1 In Course Details, Scheduler tab, select Yes for Allow Class Combining.
- 2 To control the size of a combined class:
  - Reduce class size in the Sections window under Capacity in Scheduler.OR  
Reduce the maximum class size in Course Details.
- 3 In Scheduler, choose Class Combining from the Schedule menu, then select New Group and enter a name for the group. It is a good idea to include “Group” in the name of the group for easy identification of a combined class. For example, you can combine Intermediate and Advanced Spanish and call it Spanish Group.
- 4 Double click each class that is to be in the group.
- 5 Select the radio button for the class that is to represent the group.
- 6 Click OK.

---

## **Step 3: Loading Teachers**

If you will not use the Create Timetable command, skip this section.

When you have set up sections for each course, load teachers for those classes. By loading teachers, you establish which teachers can be scheduled

for each class.

Loading teachers processes the teacher course preferences set in Details for Create Timetable. For each course, a pool of teachers is created. A teacher pool might consist of different teachers, each loaded to teach 1 or more sections of a course, or it might consist of 1 teacher, loaded to teach every section of the course.

Adjust loading to allow a teacher to teach several classes in each of 2 or more courses. You might have to change the loading percentage and/or edit specific teacher loading to do this.

### Using the Load Teachers Command

If you are building your school timetable manually, you do not need to use the Load Teachers command.

Each school year, the first time that you choose Load Teachers from the Schedule menu, Scheduler loads teachers for your courses based on:

- teacher course preferences
- maximum blocks taught (defined in Teacher Details)
- number of sections of each course
- level of overfilling

Before loading teachers, Scheduler asks you for a percentage of overfilling. The default is 34%. Click OK. When the process is complete, the Teaching window appears.

For more information on overfilling, see “Editing the Overfilling Percentage” on page 31.

Teaching													
Algebra 11: Loaded with 1 teacher(s), 5 block(s) for 4 term(s). Arness, James: Loaded with 16 section(s), scheduled for 5. Maximum blocks: 35. Maximum consecutive periods: 7.													
Course Name	Requests	Left: Teachers loaded. Right: Number of sections.								Totals			
		1	2	3	4	1	2	3	4				
Algebra 11	27	2	2	2	2	2	2	2	2	2	2	8	8
Algebra 12	36	2	2	2	2	2	2	2	2	2	2	8	8
Biology 11	20	1	1	1	1	1	1	1	1	1	1	4	4
Biology 12	28	2	2	2	2	2	2	2	2	2	2	8	8
Teacher Name	Max Load /Pref	Left: Loaded for course. Right: Total load.								Totals			
		1	2	3	4	1	2	3	4				
Arness, James	35	1	4	2	4	2	4	2	4	2	4	8	16
Cavein, Tich A.	35	0	3	0	3	0	3	0	3	0	3	0	12
Dean, Bob	35	0	3	0	3	0	3	0	3	0	3	0	12
Doctor, Heinrich	35	0	0	0	0	0	0	0	0	0	0	0	0
Doctor, Heinrich	35	0	0	0	0	0	0	0	0	0	0	0	0
Domoney, Dennis	35	0	1	0	1	0	2	0	2	0	2	0	6
Courses for: Arness, James	Requests	Left: Sections loaded. Right: Sections scheduled.								Totals			
		1	2	3	4	1	2	3	4				
Algebra 11	27	2	2	2	1	2	1	2	1	2	1	8	5
Algebra 12	36	2	0	2	0	2	0	2	0	2	0	8	0

Load Teachers does not schedule teachers. It reserves enough teachers to teach all the sections of each course. Teachers are scheduled when you run Create Timetable or schedule them manually.

A teacher can be reserved for 1 or more sections of a course.

## Editing the Overfilling Percentage

Scheduler can load more teachers for a course than are needed to teach it. Overfilling means that when you run Create Timetable and a teacher loaded for a course can't teach it because of timetable conflicts, another teacher can be scheduled.

### To change the number of extra teachers loaded:

- 1 From the Schedule menu, choose Load Teachers.
- 2 Change the Teacher Overfilling percentage.

### Optimizing the Overfill

The optimum overfill for most schools is either 0% or 34%.

Set the overfill to 0% if you know the courses each teacher must teach. If you increase the overfill, teachers might be assigned to courses for which they have a low preference, or enough teachers might not be available for all classes.

If there is flexibility in the courses teachers teach, set the overfill to 34%. An overfill of 34% loads 4 teachers for every 3 sections, so a section can be scheduled whenever any of the 4 teachers is available.

## Re-loading Teachers

After you have loaded teachers, whenever you choose Load Teachers from the Schedule menu, you are asked if you want to overwrite your previous work.

If you change the numbers of sections in any of the following, you can either manually adjust information in the Teaching window or re-load teachers.

- Set Sections window
- Course preferences in Teacher Details
- Teacher block maximums in School Setup or Teacher Details

### To re-load teachers:

- 1 From the Schedule menu, choose Load Teachers.
- 2 In the confirmation dialog, click OK.
- 3 Enter an Overfilling percentage, then click OK.

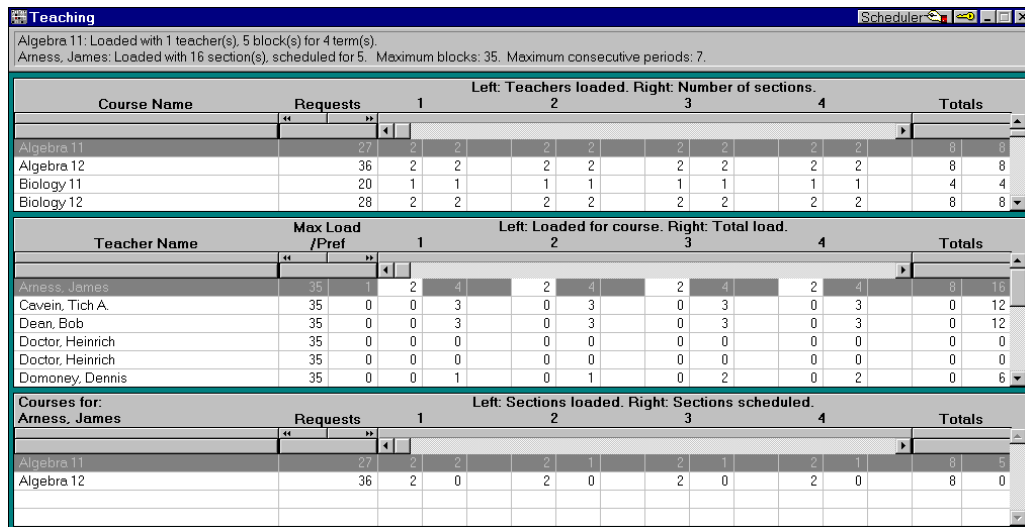
## Examining Teacher Loading Results

After you load or reload teachers, the Teaching window opens. You can also open the Teaching window by choosing Teaching from the Windows menu.

The Teaching window displays course information in the top section, teacher information in the middle section, and the courses to be taught by the highlighted teacher in the bottom section.

Check the results displayed in the middle and lower lists to be sure that each course has enough teachers loaded, and that teachers have a balanced teaching load.

The information bar at the top of the Teaching window gives loading information for the highlighted course and teacher.



Algebra 11: Loaded with 1 teacher(s), 5 block(s) for 4 term(s). Arness, James: Loaded with 16 section(s), scheduled for 5. Maximum blocks: 35. Maximum consecutive periods: 7.												
Left: Teachers loaded. Right: Number of sections.												
Course Name	Requests	1	2	3	4	Totals						
Algebra 11	27	2	2	2	2	2	2	2	2	2	2	8
Algebra 12	36	2	2	2	2	2	2	2	2	2	2	8
Biology 11	20	1	1	1	1	1	1	1	1	1	1	4
Biology 12	28	2	2	2	2	2	2	2	2	2	2	8

Left: Loaded for course. Right: Total load.												
Teacher Name	Max Load /Pref	1	2	3	4	Totals						
Arness, James	35	1	2	4	2	4	2	4	2	4	2	16
Cavein, Tich A.	35	0	0	3	0	3	0	3	0	3	0	12
Dean, Bob	35	0	0	3	0	3	0	3	0	3	0	12
Doctor, Heinrich	35	0	0	0	0	0	0	0	0	0	0	0
Doctor, Heinrich	35	0	0	0	0	0	0	0	0	0	0	0
Domoney, Dennis	35	0	0	1	0	1	0	2	0	2	0	6

Left: Sections loaded. Right: Sections scheduled.												
Courses for: Arness, James	Requests	1	2	3	4	Totals						
Algebra 11	27	2	2	2	1	2	1	2	1	2	1	5
Algebra 12	36	2	0	2	0	2	0	2	0	2	0	6

### Reading the List of Courses (View Only)

Use the second column to display course information, including the number of sections, number of requests, and number of students scheduled.

Each term has 2 columns: number of teachers loaded at left, number of sections to be taught at right.

The number of teachers loaded, and the number of sections taught totaled for all terms. Number of teachers loaded should be equal to or greater than number of sections taught.

Any course name in red means the number of teachers loaded is less than the number of sections. Without enough teachers, Create Timetable cannot fully schedule that course. Unless you plan to manually schedule teachers, load more teachers.

### **Reading the List of Teachers**

These totals are term totals, which are not the same as a total of the number of sections of a course that teachers are loaded or scheduled for, unless all your courses are 1 term long.

You can manually load teachers by selecting the course and double-clicking the teacher name.

### **Reading the List of Teacher's Courses (View Only)**

The bottom list reports the courses that the teacher prefers, is loaded for, or is scheduled to teach.

Double-click a course in the bottom section to highlight it in the top section.

## **Editing Teacher Loading**

Set up all available teachers for each course.

The more teachers loaded for a course, the better chance each class will be scheduled.

When you edit teacher loading, your changes are saved and the section totals are updated as you edit.

#### **To edit teacher loading:**

- 1 From the Windows menu, choose Teaching.

The bottom part of the window shows the course loading for a teacher.

- 2 In the top list, highlight a course to edit its loading.

- 3 In the teacher list, click the left number in a term column, then type a number. Press Tab to move to the next term.

Every time in each term that a teacher is loaded for a course section, the total for the term and for the year is increased. See the Totals column of the teacher list to check totals.

- 4 To load a teacher once more in each term that the highlighted course is taught, double-click the teacher's name.

## **Monitoring the Teacher Loading Process**

To track progress when loading teachers, use these Scheduler reports.

**Teacher Loading Report.** For selected teachers, choose Teacher Loading from the Reports/Algorithm menu to print the maximum block load and all course preferences, the level of preference, the courses the teacher is loaded for, the number of sections loaded, the courses scheduled into, and the number of sections scheduled.

**Course Loading Report.** The Course Loading report from the Reports/Algorithm menu describes preference for the course, the numbers

of terms, sections and blocks loaded, and numbers of sections and blocks scheduled.

**Resource Check Report.** For selected courses, choose Resource Check from the Reports/Algorithm menu to show teachers loaded for each course, their level of preference for the course, the number of times they are loaded in each term, and the rooms in which they can teach. Use this report to check that teachers have compatible room preferences for the courses for which they are loaded.

**Equivalent Full Time Report.** The Equivalent Full Time (EFT) report from the Reports/Special menu lists all courses by department. For each course, it lists the number of sections, the EFT per section and EFT required to teach all sections. For each department, the report lists the total required EFT. At the end of the report are total sections, and total required EFT.

**Special Courses Report.** Choose Special Courses from the Reports/Algorithm menu to find courses in linked groups, or that require all sections taught in the same blocks.

If all sections of a course must be taught at the same time, the number of different teachers loaded for the course must be equal to or greater than the number of sections in the course.

Classes in linked groups are taught at the same time, so check that you have different teachers loaded for each class.

**To schedule 1 teacher into 2 classes at the same time:**

- Use Class Combining or use Resource Mapping as described in the Win School System Administrator Guide.
- If you have linked 2 or more courses using clones that are taught in the same period, check that you have cloned teachers loaded for each class.

## Establishing Student Clusters

Clusters may be created for several reasons and in several ways:

- A cluster can be scheduled for 1 section of a course reserved for that cluster. This results in each class having a different roster, but all the students in 1 cluster take the same limited group of required classes. This is particularly useful with Team Teaching.
- A specific program and grade can have only 1 cluster, reserving sections of required courses for students in that program and grade.
- Define clusters by multi-pasting classes to groups of students. This is the easiest procedure for simple timetables.
- Select a cluster to minimize conflicts when electives and cluster courses are scheduled at the same times in the day.

Student clusters are created automatically in Scheduler.

**Before you can create clusters and teams in Scheduler:**

- 1 In the Details module, identify courses by program, for clustering.
- 2 Make a list of the courses that clustered students take together in each program at each grade level.
- 3 In Details, for each course in which you want student clusters:
  - In the Scheduler tab, set Student Clusters to Yes.
  - In the Lists tab, Required view, include each normal program that needs that course in its clusters.

**Loading Teaching Teams for Student Clusters**

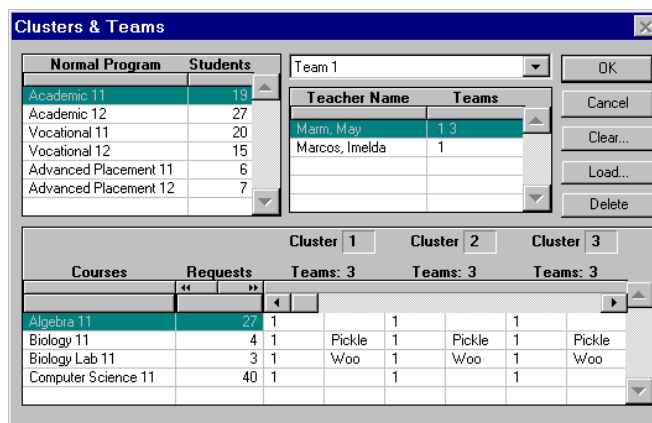
Team teaching requires student clusters, but student clusters do not require team teaching. Before loading teaching teams:

- In Details, establish that students can be clustered.
- In Details, establish teaching teams.
- In Scheduler, load the teams.

**To load teaching teams:**

- 1 Make sure you have entered requests, set sections, and loaded teachers.
- 2 From the Schedule menu, choose Clusters & Teams.
- 3 Select a Normal Program in the top left section. The courses for the clusters for that program display in the lower part of the dialog.

The lower part of the dialog shows the Cluster numbers. If you change the Cluster numbers to be the same number, then Scheduler will randomly assign students into 1 of those clusters.



- 4 From the All Teachers popup menu in the top right, select a Team. The names of the teachers in that team, and the teams each teacher belongs to, are displayed below.

- 5 In the lower part of the dialog, replace the zeros with the Section number for each team, and click in the right-hand column beside the section number, then double-click a teacher name to enter it.
- 6 In the upper part of the dialog, edit the Cluster numbers to create larger clusters of students.
- 7 Later, when you assign students, select the “Schedule students into clusters” checkbox. Students must have a grade and program assigned.

The Student Clusters report lists all the students in each cluster and their classes. Off Team appears in the row for any class not in that cluster.

### Scrambling Periods

You can set up your schedule so classes are taught in different periods instead of during the same period every day. By making its own version of the Timetable Structure you set up in School Setup, as shown in the following figure, Period Scrambling randomly rearranges the blocks each day.

		<input checked="" type="checkbox"/> Edit/Display Scrambling	<input type="checkbox"/> Edit/Display Scrambling
<b>Periods</b>		<b>Scheduler Timetable</b>	<b>School Setup Timetable</b>
		M T W T F	M T W T F
8:30 AM -> 9:15 AM	1	A O V AB AH	1 A I Q <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">Y</span> AG
9:15 AM -> 10:00 AM	2	B L X AD AG	2 B J R Z AH
10:00 AM -> 10:45 AM	3	<span style="border: 1px solid black; border-radius: 50%; padding: 2px;">C</span> <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">N</span> <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">W</span> <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">Y</span> <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">AJ</span>	3 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">C</span> K S AA AI
11:00 AM -> 11:45 AM	4	D M Q AF AI	4 D L T AB <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">AJ</span>
11:45 AM -> 12:30 PM	5	E K R AE AL	5 E M U AC AK
1:15 PM -> 2:00 PM	6	F P T Z AK	6 F <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">N</span> V AD AL
2:00 PM -> 2:45 PM	7	G I U AA AN	7 G O <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">W</span> AE AM
2:45 PM -> 3:30 PM	8	H J S AC AM	8 H P X AF AN
		<b>Scrambled Period Mapping</b> (periods relative to Monday)	
		M T W T F	
Use the Scrambled Period Mapping table (available in the Class Timetable Report) to translate between the two timetables. The cells' geographical arrangement follows the School Setup pattern, and their contents describe their Scheduler periods.		1	1 7 4 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">3</span> 2
		2	2 8 5 6 1
		3	<span style="border: 1px solid black; border-radius: 50%; padding: 2px;">3</span> 5 8 7 4
		4	4 2 6 1 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">3</span>
		5	5 4 7 8 6
		6	6 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">3</span> 1 2 5
		7	7 1 <span style="border: 1px solid black; border-radius: 50%; padding: 2px;">3</span> 5 8
		8	8 6 2 4 7

**To scramble periods:**

- 1 In School Setup, choose Timetable Structure from the Scheduler menu, and give every period a different block letter.
- 2 In the Periods tab in Course Details, set “Same periods each day” to Yes for all courses.
- 3 In Scheduler, enter requests, set sections, and load teachers.

- 4 To generate a scrambled timetable, choose Scramble Periods from the Schedule menu.
- 5 If some courses use Consecutive Blocks or Following Triplets, select Doubles Together.
- 6 From the Edit menu, choose Preferences. In the Periods Scrambling Display section, choose the Show Scrambled Periods radio button. Close the Preferences dialog and save the changes.
- 7 To view the scrambling pattern, select a class in the Classes view, then choose Class from the Reports/Timetable menu.
- 8 To change the scrambling pattern, re-do steps 4 and 5.

**To change display and print options for scrambled periods:**

- 1 From the Edit menu, choose Preferences.
- 2 Make a selection in the Period Scrambling Display section, then choose Save from the File menu, and close the Preferences dialog.

Select	To show	When to use it
<b>Show Actual Periods</b>	Block structure that appears in all other modules	To see when classes will actually meet, select this preference before printing timetables for distribution to students and staff.  When this preference is selected, Actual Periods appears in the School Timetable and Student Timetable window titles.
<b>Show Scrambled Periods</b>	Block structure that appears only in Scheduler	When building the school timetable, schedule classes into the same period each day to make them follow the scrambling pattern consistently.  You might also find this option helpful when editing student timetables.  When this preference is selected, Scrambled Periods appears in the School Timetable and Student Timetable window titles.

---

## Step 4: Creating the School Timetable

After loading teachers for all classes, you can create the school timetable.

When your scheduling is done, before printing timetables, select Show Actual Periods in Preferences so that timetables appear in the order in which they will be taught.

The general procedures for creating the school timetable are:

- 1 Create the Conflict Matrix.
- 2 Reserve teachers and rooms.  
See “School Timetable” on page 90 for detailed information about using the School Timetable window.  
To prevent a teacher or room from being scheduled during a specific scheduling block, reserve it.
- 3 Manually schedule and lock classes.  
Manually schedule and lock any class that must be taught during a specific period. If your timetable is pre-determined, you don’t have to perform any procedures after this one.
- 4 Run the Create Timetable process to automatically schedule classes.  
The Create Timetable process includes running a pre-check, fixing problems, and running a ‘finishing’ scheduling run.

Although these steps are in chronological order, you will need to repeat some procedures to assemble the timetable.

## Generating the Conflict Matrix

If you are manually scheduling some courses before using Create Timetable, generate the Conflict Matrix. Otherwise, Create Timetable automatically generates the Conflict Matrix.

For specific information about what the Conflict Matrix displays, see “Conflict Matrix” on page 98.

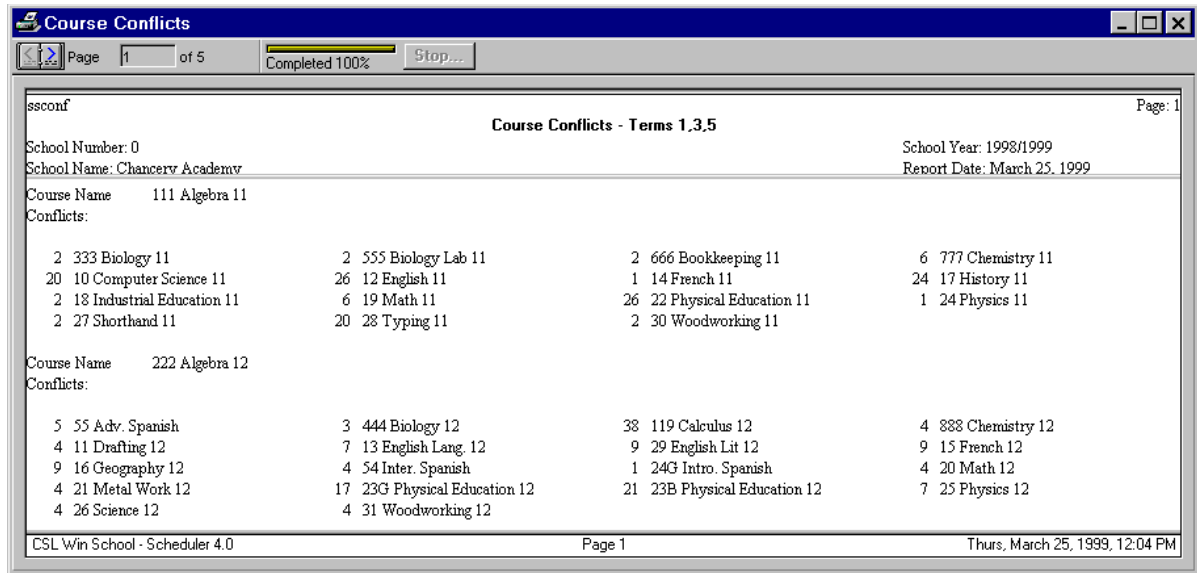
To generate the Conflict Matrix for specific terms, see “Generating the Term-Based Conflict Matrix Report” on page 75.

### To generate the Conflict Matrix:

- 1 From the Windows menu, choose Conflict Matrix.
- 2 From the System menu, choose Print.
- 3 In the dialog that appears, choose whether you want matrix or list format.

Matrix format is a grid similar to what you see on screen. List format lists the courses and their conflicts.

If you deselect matrix format, the report is printed in list format. You can choose whether to print single-section courses only. While single-section courses consume less memory, they are most affected by conflicts. For example, students who request 2 single-section classes will get only 1 of the classes if both are scheduled for the same time.



## Reserving Teachers and Rooms

If any room or teacher has to be reserved for any reason, reserve it before using Create Timetable. Use reservation labels to prevent a room or teacher from being assigned to a class at a particular time.

Set up reservation labels, such as Counseling or Study Hall in School Setup. When a room or teacher is reserved, it cannot be scheduled during that time. For example, a room might be needed for a regular meeting or a teacher might only work mornings.

### To reserve a room or teacher:

- 1 From the Windows menu, choose School Timetable.
- 2 In the Timetable for section, select Teacher or Room.
- 3 In the Enter by section, select the period of time.  
For any timeframe except Year, select a term in the Timetable Term section.
- 4 Highlight an item in Teacher Name or Room Number.
- 5 Highlight a label in Reserve Label.
- 6 Double-click the appropriate cell in the Teacher or Room Timetable in the lower list.

### To clear a reservation:

- 1 From the Windows menu, choose School Timetable.
- 2 In the Timetable for section, select Teacher or Room.
- 3 In the Enter by section, select the period of time.

For any timeframe except Year, select a term in the Timetable Term section.

- 4 Highlight an item in Teacher Name or Room Number.
- 5 In the timetable in the lower list, highlight the cell to be cleared.
- 6 Press Delete.

**To clear reservation labels from selected room or teacher timetables:**

- 1 In the Teachers or Rooms view of the Main window, select the teacher(s) or room(s).
- 2 From the Schedule menu, choose Clear.
- 3 Select an option from the Clear dialog. See “Clear” on page 82 for more information.

## Manually Scheduling Classes

If you use automatic scheduling as well as manual scheduling, lock each class or Create Timetable will de-schedule your work. Before running Create Timetable, manually schedule and lock any classes that must be taught during a specific period.

If you are manually scheduling all your classes, you do not have to lock them.

Do not schedule a teacher into too many blocks or consecutive blocks. Manual scheduling overrides the teacher block information set in School Setup and Details.

For information on locking classes, see “Locking or Unlocking Classes” on page 42.

See “School Timetable” on page 90 for detailed information about using the School Timetable window.

**To manually schedule a class:**

- 1 From the Windows menu, choose School Timetable.
- 2 In the Timetable for section, select Classes.
- 3 In the Enter by section, select the timeframe.

To schedule a class into the same periods for all terms, select Year.

- 4 In the Class Display Mode section, select Room / Teacher.
- 5 Highlight:
  - a class
  - a teacher for that class
  - a room for that class and teacher

6 In the Class Timetable, double-click:

- a block or period

OR

a cell for a term or year

Scheduled cells display marks at the left. When a class is fully scheduled, the name turns from red to black.

**To remove a class from the schedule:**

- To delete a class from 1 block or period, select Block or Period in the Enter by section. Highlight the block or period in the bottom part of the window and press Delete.
- To delete a class from all scheduled periods, select Term or Year in the Enter by section. Highlight a cell in the bottom part of the window and press Delete.

If you de-schedule any block or time for a class, all students scheduled to take the class are removed from the schedule for that block. If they have a request for that course, they are placed on the Wait List.

See also “Removing Classes from the School Timetable” on page 51.

**Symbols in the Class Timetable Area**

The timetable in the lower third of the School Timetable window displays the following symbols:

- Triangle** You can schedule the class highlighted in the Class Name list in this time slot, according to the periods established for the course in Details. You can actually schedule the class in any time slot, regardless of whether it displays a triangle.
- T** The teacher highlighted in the Teacher Name list is busy in this time slot.  
T is blue or gray when the teacher is scheduled for another class in that time slot.  
T is black or yellow when the teacher has a reservation label in that time slot.
- R** The room highlighted in the Room Number list is busy in this time slot.  
R is red or green when another class is scheduled in the room in that time slot.  
R is black or yellow when the room has a reservation label in that time slot.

Period	Day 1
1	100/Arness
2	

You cannot schedule classes into periods/blocks which display T or R. Check the relevant room or teacher timetables to check what is creating the conflict, and make changes as required. You will have to reschedule 1 of the conflicting classes or change your room/teacher assignments.

Names of combined classes are bold in the lower part of the window.

### Using Different Class Display Modes in the School Timetable Window

We recommend you select Classes in the Timetable for section, and use Class Display Mode while you are manually scheduling. Run the Conflict Matrix from the Windows menu before using these displays.

When you are manually scheduling, use Difficulties, Superimpose, and Superimpose All in the Class Display Mode section to help produce the fewest request conflicts with already-scheduled courses.

Class Display Mode:				
Room/Teacher	Blocks	Superimpose	Superimp. All	Difficulties

#### Class Display Mode options:

- Room/Teacher: displays teacher and room scheduled for the highlighted class.
- Blocks: displays block letters to help schedule repeating blocks.
- Superimpose: displays scheduled courses that have request conflicts with the highlighted class. These courses have been requested by a student who has also requested the highlighted class. To check for request conflicts between specific courses and the highlighted class, select those courses in the Courses Main window, then select Superimpose.
- Superimpose All: displays other courses requested by students requesting the highlighted course. If you select Superimpose, this view displays the same information but for only the courses you select in the List of Courses window.
- Difficulties: lists request conflicts with scheduled classes. Schedule the class in the period with the lowest difficulty.

### Locking or Unlocking Classes

You can only lock a class after you have scheduled it into a room with a teacher. Before running Create Timetable, manually schedule and lock any classes that must be taught during a specific period.

If you use automatic scheduling as well as manual scheduling, lock each class or Create Timetable will de-schedule your work.

If you are manually scheduling all your classes, you do not have to lock them.

**To lock or unlock a particular class:**

- 1 In the School Timetable window, highlight a class in the Class Name list.
- 2 Click the Lock button above and to the left of the Class Name list. A padlock icon appears to the left of the locked class.

Class Name		Terms Offered
🔒	Adv. Spanish (1)	5
	Algebra 11 (1)	1/2
🔒	Algebra 11 (2)	1/2
	Algebra 12 (1)	1/2
	Algebra 12 (2)	1/2
	Biology 11 (1)	1/2
	Biology 12 (1)	1/2
	Biology Lab 11 (1)	1/2
	Bookkeeping 11 (1)	3
	Calculus 12 (1)	1/2

**To lock or unlock all scheduled classes by term:**

- 1 In the Classes Main window, choose Lock Classes from the Schedule menu.
- 2 Select (darken) the terms in which you wish to lock or unlock classes.
- 3 Click Lock or Unlock. All classes scheduled in the specified term(s) will be affected. In the Classes Main window, padlock icons appear in the left margin beside locked classes.

**Tips for Scheduling Classes**

- Use the VCR buttons to check which terms a class is taught or offered.
- When you want to automatically schedule classes for the year, start scheduling with the first term in which the class is taught. The Sched Year button at the left copies scheduling information only to those terms which follow the current term.
- To schedule a class without a teacher or room, select N/A for the name. N/A will appear in the timetable instead of the teacher or room name. If the class is scheduled, but has neither a teacher nor a room, N/A / N/A appears in the block(s) in which the class is scheduled.
- If a teacher or room is busy, and Scheduler displays an alert message, check the relevant room or teacher timetables. Use options in the Timetable for section to find the conflict. Make changes as required. You will have to reschedule 1 of the conflicting classes or change room or teacher assignments.
- If you de-schedule any block or time for a class, all students scheduled to take the class are removed from the schedule for that block. If they have a request for that course, they are placed on the Wait List.

### Using Key-and-mouse shortcuts

In Class Names, control-click to find the first unscheduled class.

With a class highlighted, control-click the Teacher Name list to find the first teacher with a preference for that course.

Control-click Room Names to find the first room with preference for that course and teacher.

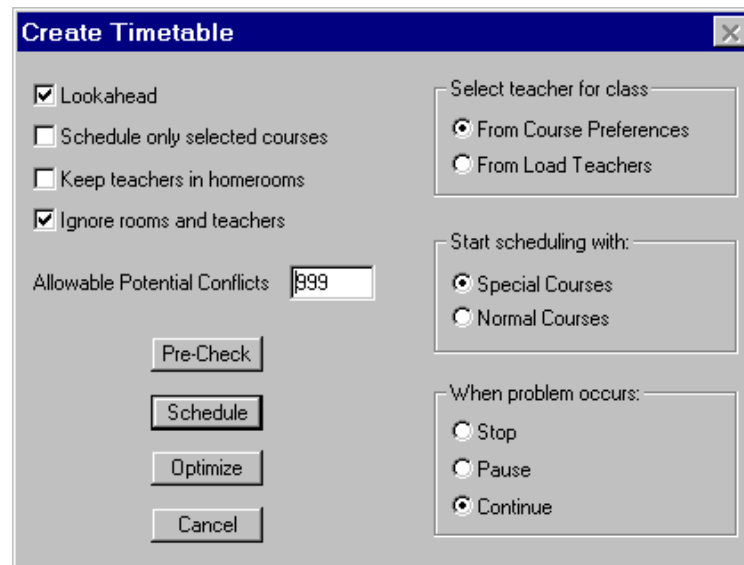
### Using Create Timetable

Create Timetable is the automatic process for scheduling.

The time required for Create Timetable to schedule a school depends on these factors:

- the type of PC you use
- whether the PC is running on a network
- the number of blocks, classes, teachers, and rooms
- the constraints you have set, and the complexity of your timetable

To schedule your school, run Create Timetable several times and between runs, lock the classes with schedules you like.



Read the Win School System Administrator Guide for tips on how to approach the Create Timetable process for each scheduling run.

See “Create Timetable” on page 83 for a complete description of the Create Timetable dialog.

### **Pre-checking Scheduling**

Pre-Check initializes your data by:

- Removing students from unlocked classes and unscheduling those classes from the school timetable.
- Determining teachers available for courses.
- Examining classes.

This process can take some time, depending on the number and size of classes that must be cleared.

Pre-Check doesn't schedule classes. It examines the number of blocks and terms in which classes will be taught in relation to the rooms and teachers available for those classes, then alerts you to possible conflicts. This allows you to fix problems before an actual scheduling run.

Pre-Check helps you to avoid scheduling many classes, then discovering unworkable room/teacher selections or Course Details settings that prevent you from completing your school timetable.

#### **To run pre-check:**

- 1 Lock classes you don't want changed or removed.
- 2 From the Schedule menu, choose Create Timetable.
- 3 Select options in the Create Timetable dialog, as required:

**Lookahead:** looks at available rooms and teachers, and checks all sections of a course to find the best room/teacher combination. Lookahead is useful only for courses with more than 1 section.

**Schedule only selected courses:** based on courses selected in the Courses Main window. Use to schedule courses in groups, according to priority. Useful for resources in very high demand, such as a gym or a lab, and single-section courses.

**Keep teachers in homerooms:** based on homerooms defined in Teacher Details. Useful for elementary school teachers in 1 room only. When teacher room preferences are this restrictive, course room preferences should be very broad. You should be able to set most course room preferences to Any room.

**Ignore rooms and teachers:** ignores room and teacher preferences.

**Allowable Potential Conflicts:** looks at the number of conflicting requests for the class before determining that the class cannot be scheduled. Student requests, teachers, and physical resources are all considered.

**From Course Preferences:** selects teachers for classes based on availability for that class and Preferred Courses in Details.

OR

**From Load Teachers:** selects teachers for classes based on the teachers loaded.

Optimize: does not apply to Pre-Check.

- 4 Click Pre-Check.
- 5 The Pre-Check for Create Timetables report window opens, listing the name of each class that is locked or has problems with room or teacher selections, and the nature of the problem. The number of problems found and the total number of classes examined appear at the end of the list.
- 6 Resolve problems and re-run Pre-Check until no more problems appear.

### **Fixing Problems Discovered by Pre-checking**

#### **To investigate problems with room or teacher selections:**

- In Scheduler, choose Resource Check from the Reports/Algorithm menu. Check teachers loaded for each course, their level of preference for the course, the number of times they are loaded in each term, and the rooms in which they can teach. Check that teachers have compatible room preferences for the courses for which they are loaded.

Check the number of classes, room preferences, available blocks, number of days and terms, and the minimum and maximum class sizes used by Set Sections.

- In Course or Teacher Details, check course or teacher room preferences. Pre-Check must be able to find at least 1 common room in the Rooms lists of the course and its teacher.

Most courses that cannot be scheduled are the result of incompatible teacher and course room preferences.

- In Scheduler, check teacher loading in the Teaching window. If you run Pre-Check with “Select teacher for class” set to “From Load Teachers,” changing a teacher’s course preferences in Teacher Details will not have any effect on Pre-Check unless you re-load your teachers.

If you need only 1 or 2 changes, manually edit the Teaching window.

#### **To investigate problems with block or term restrictions:**

- In the Periods tab of Course Details, check Usable Blocks/Periods for this course . Make sure this setting is not too restrictive. If a course can only be taught at a certain time, schedule it manually and lock it.
- In the Sections window, in the second and third columns, use the VCR buttons to choose Problem, and correct any problems.
- Check the Sections window to see that the number of terms selected in the Terms Class Will Be Taught column matches the Course Length (in terms) setting of the Scheduler tab in Course Details.

### **Automatically Schedule**

To fully automatically schedule, you must completely resolve problems identified by pre-checking.

#### **To schedule automatically:**

- 1 From the Schedule menu, choose Create Timetable.
- 2 Select Lookahead, then set Allowable Potential Conflicts to 400. Win School always chooses the period with the lowest number of conflicts.

If you have a very restricted schedule, you might need to set this number much higher, for example, 999.

- 3 Select other options.

Always start by selecting Special Courses. Create Timetable schedules them first, then automatically continues to normal courses.

In the When problem occurs section:

- Stop: halts the process on each problem until you resolve it.
- Pause: also stops the process on each problem. However, you can resolve it immediately or have Create Timetable leave the class unscheduled and continue.
- Continue: the process proceeds past all problems without stopping. Problem classes remain unscheduled. Select Continue for preliminary runs, to identify problems with room preferences. Go to the School Timetable window to see what didn't get scheduled.

If you are resuming a scheduling run after a Scheduler pause, click Resume.

If you do not have any Special Courses or you have already scheduled them, select Normal Courses.

- 4 Click Schedule.
- 5 If Create Timetable detects a problem, go to "Fixing Create Timetable Problems" on page 48 and fix the problem.

When Create Timetable finds a problem, it will either stop, pause, or continue the scheduling run, depending on the option you selected.

- 6 If you have finished using Create Timetable to schedule both Special Courses and Normal Courses, go on to "Finishing Your School Timetable" on page 51.

#### **To stop Create Timetable when it is running:**

- Click Stop in the Create Timetable Progress window. You can also stop the process by closing the window, but you will then lose all the information it contains.

## Fixing Create Timetable Problems

If Create Timetable stops during the Special Courses phase, find the course causing the problem, correct it using the procedures below, and resume the Create Timetable process.

### When Create Timetable Stops

Examine the Create Timetable Progress window.

The title of the window tells you the phase in progress when Create Timetable stopped (Scheduling Special Courses or Scheduling Normal Courses). Or if you paused or stopped Create Timetable, the bottom lines tell you the phase being processed when it stopped, the class that could not be scheduled, and the problem.

If you continued Create Timetable despite the problem, scroll until you locate the problem.

A problem is usually 1 of the following:

- Teacher selections busy or too restrictive.
- Room selections busy or too restrictive.
- Room and teacher selections are too restrictive.
- Allowable potential conflicts too low.

Set it to 400 or higher, and resume Create Timetable. If it is already high and if you manually scheduled and locked many classes, unlock some classes and re-start Create Timetable at Special Courses.

- A single class in a Linked Group or Following Triplet or 1 of the sections of a course that needs All Sections in the Same Blocks can't be scheduled, so none of the other classes in its group will be scheduled.
- Class is partially locked.

Schedule it manually, lock it, and resume Create Timetable.

### If Classes Don't Schedule:

- 1 In the School Timetable, highlight the class that Create Timetable could not schedule, then highlight each of the teachers loaded and the rooms preferred by each teacher and the course.
- 2 Use the Teachers and Room Timetable for settings to look at their schedules for possibilities. See below.
- 3 When the problems are resolved, click Continue.

OR

Manually schedule the class and lock it.

If the class cannot be scheduled at this time, you can leave the class unscheduled and continue the Create Timetable process. You can manually schedule the class later before you assign students to it.

- 4 Either lock all your fully scheduled classes and run Create Timetable.  
OR

Select only the course(s) you are working on and select the “Schedule only selected courses” option when you run Create Timetable.

**Possible reasons for problems with scheduling classes:**

- 1 Look into the following possibilities to resolve scheduling problems:
  - check that at least 1 student is requesting the course
  - check that a reserved period can be changed
  - find another term or terms in which the class can be taught
  - check if a teacher, room, or block that is not allowed, but can be used to schedule the course
  - check that the number of times taught per term and number of terms specified in Course Details is correct
  - check the maximum number of blocks a teacher can teach
  - check the number of consecutive blocks the teacher can teach
- 2 If that doesn’t work, try the following:
  - Change course or teacher room preferences in Course or Teacher Details.
  - Change teacher loading in the Teaching window. If you run Create Timetable with the Select teacher for class option set to “From Load Teachers,” changing a teacher’s course preferences in Teacher Details will not have any effect on Create Timetable unless you re-load your teachers. If you need only 1 or 2 changes, manually editing the Teaching window is easier.
  - Change reserved periods for a teacher or room in the School Timetable window, and for a course in Course Details.
  - Change the terms in which a class is taught in the Sections window.

**If Course Can’t Be Scheduled:**

- 1 Select the course that could not be scheduled in the Courses Main window.
- 2 From the Reports/Algorithms menu, choose Resource Check to see if you have given Scheduler workable preferences.
- 3 If the problem mentions teacher selections:
  - Compare the number of sections of the course with the number of teaches loaded. The teacher loading must be enough to cover all the sections of the course.

- How many different teachers have been loaded? The more different teacher timetables Create Timetable can use to schedule a class, the more likely it will succeed.
- If you've set "All sections in the same blocks" in Course Details, you need to load as many different teachers as you have sections, since they are all taught simultaneously. Either load enough teachers or turn off "All sections in the same blocks."

If the problem mentions room selections:

- Compare the preferred rooms for the course and the teacher to see if there is an overlap. Create Timetable must find at least 1 room preferred by both. Preferences such as "101 -Art Room" and "Any Classroom" are incompatible. See if there are any other rooms you can add to 1 or both lists of preferences. To change the preferences of either, return to Course or Teacher Details.
- If the course must be taught with "All sections in the same blocks," there must be preferences for as many different rooms as sections. Check that different teachers can teach in different rooms. In Details, make room preference changes for courses and teachers.

If the problem is that allowable potential conflicts is too low, and it's at 400, try increasing the number. If that doesn't work, you might have to increase the number of usable blocks for the course.

- 4 View the course in School Timetable from the Windows menu.
- 5 Double-click the class that Create Timetable could not schedule to check each of the teachers loaded and the rooms.
- 6 To check rooms preferred by each teacher and the course, use the Teacher Main window and Room Main window to look at their schedules. You might find a reserved period that can be changed to allow the course to be scheduled. Consider changing the terms, blocks, rooms, or teachers set up for the course in Details.
- 7 When you have determined the source of the problem, resolve it using the following solutions:
  - Change course or teacher room preferences in Details.
  - If you change teacher course preferences, re-load teachers or edit teacher loading in the Load Teachers window.
  - Change reserved periods for a teacher or room in the School Timetable window and for a course in Course Details.
  - Change the terms in which a class is taught in the Set Sections window.
  - Manually schedule and lock the class.
  - If the class cannot be scheduled at this time for other reasons (perhaps you are awaiting approval to hire a new teacher or purchase a new portable classroom) you can leave the class

unscheduled, and lock it. Schedule the class manually before assigning students to it.

- 8 From the Schedule menu, choose Create Timetable, and click Schedule.

## Finishing Your School Timetable

When Create Timetable has finished building your timetable, you should optimize the timetable.

Do not skip the final optimization. It can make a big difference in results.

### To optimize your school timetable:

- 1 From the Windows menu, choose School Timetable.
- 2 Check the Class Name list for unscheduled classes. Create Timetable might have passed over unscheduled classes if you either locked unscheduled classes or set “When problem occurs” to Continue.
- 3 Schedule unscheduled classes using the School Timetable window.
- 4 Lock classes you don’t want changed, even if there may be a better spot for them in the timetable.
- 5 From the Schedule menu, choose Create Timetable. Click Optimize.

## Removing Classes from the School Timetable

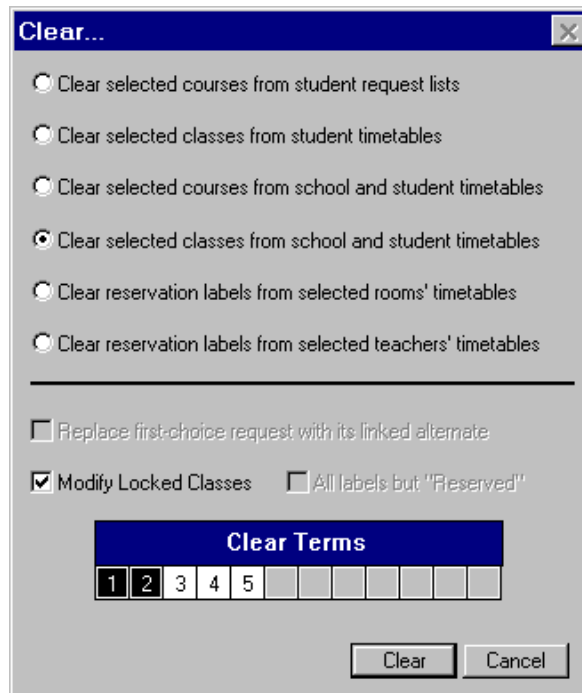
You can remove some classes from the school timetable and then schedule those classes into the timetable, either automatically or manually.

Unlocked classes are removed from the school timetable by Create Timetable. Classes can also be removed from the school timetable using the Clear dialog from the Schedule menu.

### To remove classes from the School Timetable:

- 1 In the Classes Main window, select the classes to be removed from the schedule.
- 2 From the Schedule menu, choose Clear.
- 3 In the Clear dialog, select “Clear selected classes from school and student timetables.”

If you also want locked classes to be cleared, select Modify Locked Classes.



- 4 In Clear Terms, select (darken) terms to be cleared, then click Clear. Classes not scheduled in the terms you select are left unchanged.

See also “Manually Scheduling Classes” on page 40.

## Monitoring the Create Timetable Process

To track progress when loading teachers, use these Scheduler features.

### Generating the Special Courses Report

From the Reports/Algorithm menu, choose Special Courses to get a list of Linked Groups, Following Triplets, and courses that must have all sections taught in the same blocks. These are the courses scheduled in Create Timetable’s Special Courses phase. This report also includes courses selected in the Preceding Course option in Course Details, block-restricted courses (courses that cannot be taught in any block), and courses with extra periods.

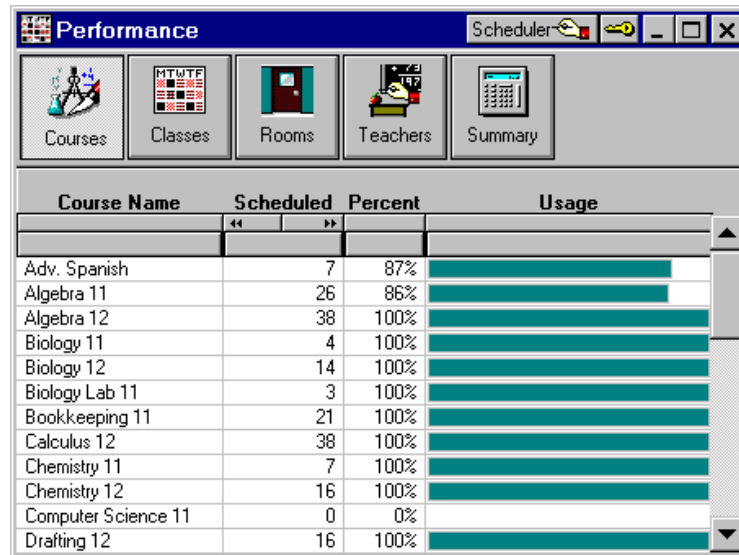
### Viewing the Create Timetable Progress Window

As Create Timetable runs, the room and teacher combinations it examines for each class are displayed in the Create Timetable Progress window. If the process stops before completion, the last line displayed indicates the problem and the class involved. If Create Timetable completes normally, a processing summary is displayed. Page numbers refer you to the relevant processing commentary in the body of the report.

### Viewing the Performance Window

From the Windows menu, choose Performance and click a view for information on courses, classes, rooms, and teachers. The Courses, Classes, and Teachers views display items from the respective lists, as well as optional information in the second column. Use the Percent and Usage columns to assess resource use and scheduling performance.

Usage displays a bar chart representation of the Percent figure.



The figure in the Percent column has the following meaning in each view:

Courses	Total number of students scheduled for all sections of the course, divided by the total number of requests for that course.
Classes	Number of students scheduled into the class divided by its capacity (lesser of Max. Class Size in Details and Max. Room Size in School Setup).
Rooms	Number of times the room is used divided by the number of times the room is available (times refers to slots in your school timetable).
Teachers	Number of times the teacher is used divided by the number of times the teacher is available (times refers to slots in your school timetable).
Summary	Totals of scheduling results.

Sort order is determined by the order in the Main window. Print any Performance window from the System menu.

### Generating the Block Capacities Report

From the Reports/Lists menu, choose Block Capabilities. In the Print Options dialog, select blocks in each term. The report displays the following:

- The Students column lists the number of students in each grade and in the school.
- The Total Class Capacity columns list the number and percentage of seats in classes for each grade level and in total. The percentage is the number of seats in scheduled classes divided by the number of students.

Total Class Capacity percentage should be equal to or greater than 100%. If not, you might not have enough classes scheduled during that block to accommodate all students. In that case, look for blocks with a very high Total Class Capacity percentage, then in the School Timetable (from the Windows menu), look for classes that can be moved from the very full blocks to the under-filled blocks. Before moving a class, display Difficulties in the School Timetable window from Class Display Mode.

- The Seats Available columns list the number and percentage of available seats.
- The Seats Filled columns list the number and percentage of filled seats.

Block Capacities Report Chancery Academy										
Block	Grade	Students	Classes	Total Class Capacity		Seats Available		Seats Filled		
A-1	10	2	0	0	0%	0	0%	0	0%	
	11	49	1	28	57%	16	57%	12	42%	
	12	51	2	100	196%	51	51%	49	49%	
	Total	102	3	128	125%	67	52%	61	47%	
B-1	10	2	0	0	0%	0	0%	0	0%	
	11	49	1	15	30%	0	0%	24	160%	
	12	51	0	0	0%	0	0%	0	0%	
	Total	102	1	15	14%	0	0%	24	160%	

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### Generating the Timetable Reports

You can display reports to look at your timetable in different ways. From the Reports/Timetable menu, choose Course, Class, Room, Student, or Teacher. From the Reports/Special menu, choose Class Blocks or Period Schedule.

### Viewing Teacher Timetable and Room Timetable Windows

These windows display teacher and room timetables in a block grid.

---

## Step 5: Creating Student Timetables

When you have created your school timetable, start scheduling students.

### General procedures for scheduling students:

- 1 Reserve periods for specific students.
- 2 Manually schedule students that must be in a particular section.
- 3 If you have entered requests, choose Assign Students from the Schedule menu.
- 4 Resolve scheduling conflicts by manually scheduling unscheduled students.
- 5 If you have set up study halls in each period in each term, use Assign Study from the Schedule menu to schedule students into Study Halls in all their unscheduled periods.

### Reserving Periods

If you have students involved in special programs or performing special duties, you can reserve periods so Assign Students will not schedule classes into them. Periods are reserved using the reservation labels you defined in School Setup.

#### To assign a reservation label:

- 1 From the Windows menu, choose Student Timetable, then in the Display Mode section, choose Classes.
- 2 In the View Classes section, click Labels.
- 3 In the Enter By section, select a timeframe, then select a term from the Timetable Term section, unless you selected Year.
- 4 Highlight a label in the Reserve Label list.
- 5 Double-click a timeslot to schedule the label.
- 6 Assign the label to every period in every term you need it assigned.

#### To delete a reservation label:

- 1 Highlight the block or period containing the label. Deletion is controlled by your selection in the Enter by section.
- 2 Press Delete.

You can also remove reservation labels from selected room or teacher timetables by using Clear from the Schedule menu.

### Manually Scheduling 1 Student

If a student must take a specific section of a course, schedule that student before using Assign Students from the Schedule menu to schedule all students.

If you are manually scheduling more than 1 student into the same class, we recommend you use Multi-pasting as described in “Manually Scheduling Many Students (Multi-pasting)” on page 58.

If you are manually scheduling your school, review both methods, then choose the best approach or mix of approaches to use.

**Manually Scheduling for the whole year or 1 term:**

- 1 In the Students Main window, highlight the student name.
- 2 From the Windows menu, choose Student Timetable. Then in the View Classes section, select any option except Labels.
- 3 In the Enter by section, select Year or Term. If you selected Term, select the term you wish to schedule in the Timetable Term section.
- 4 In the Class Name list, double-click the class to be scheduled.

If the Status column shows Busy for a class, that class conflicts with a class already scheduled in the student’s timetable. If you schedule that class, the conflicting class is removed from the timetable entirely, regardless of the setting in the Enter by section.

**Student Timetable (Actual Periods)**

Scheduler

Brier, Ethel  
Grade: 12  
Ethnic Cat: Caucasian  
Requested Credits: 8.00  
Scheduled Credits: 4.00  
Required Credits: 7.0  
Normal Program: Academic  
Special Program: Accelerated

**Display Mode:** Classes Blocks Superimp.

**View Classes:** In School In Period Requested Labels

**Enter by:** Block Period Term Year

**Timetable Term:** 1 2 3 4 5

Transfer Marks

Start Date for Change: 23 MAR 99

View Transfers

Class Name	Status	PreReq	Period	Students
Biology 12 (1)	Requests	PreReq:Biology 11	N/A	0 of 30
Calculus 12 (1)	Requests		N/A	0 of 28
Calculus 12 (2)	Requests		N/A	0 of 28
Chemistry 12 (1)	Requests	PreReq:Chemistry 11	N/A	0 of 30
English Lang. 12 (1)	Taking	PreReq:English 11	5	9 of 30
Geography 12 (1)	Taking		6	9 of 35
Physical Education 12 (1)	Taking		1	25 of 50

Period	Day 1	Day 2	Day 3	Day 4	Day 5
1	Physical Educ... 12 (1)	Physical Educ... 12 (1)		Physical Educ... 12 (1)	
2				Geography 12 (1)	
3			Physical Educ... 12 (1)		
4					
5	English Lang. 12 (1)	English Lang. 12 (1)			Geography 12 (1)
6	Geography 12 (1)		English Lang. 12 (1)		
7		Geography 12 (1)			Physical Educ... 12 (1)
8			Geography 12 (1)	English Lang. 12 (1)	English Lang. 12 (1)

**Manually Scheduling for 1 block or period:**

- 1 In the Students Main window, highlight the student name.
- 2 From the Windows menu, choose Student Timetable.
- 3 In the Display Mode section, select Classes.
- 4 In the View Classes section, select any option except Labels.
- 5 In the Enter by section, select Period or Block.
- 6 In the Timetable Term section, select the term you wish to schedule.
- 7 In the Class Name list, double-click the class to be scheduled.
- 8 In the timetable, triangles appear in the timeslots that the class meets. Double-click a timeslot to schedule the student.

If you schedule a class into a timeslot that already contains a class, the conflicting class is removed from all scheduled timeslots for that student. If you entered by Term or by Year, the class is removed for the term or year, respectively.

If you schedule a class into a block which is not in your Timetable Structure, the class will not be displayed in the period/day timetable grid at the bottom of the window. To see the class, select Block in the Enter by section. The Class Name column displays the class name, and the Status column displays Taking.

**To find the next class for an unscheduled period:**

- In the Student Timetable window, control-left-click the empty period. The next class taught at that time is highlighted in the Class Name column.

OR

Highlight the empty period and click In Period in the View Classes section. Only classes taught in that period appear in the Class Name column.

- The Teachers column shows the number of active students assigned to a teacher in the selected year (Yr) and term (Trm). If a student is in 2 classes taught by the same teacher, that teacher is considered responsible for 2 students.

**To remove a class from a student timetable:**

- Highlight a block or period containing the class and press Delete.

OR

Assign Free to any periods or blocks in which the class is taught.

The class is removed from the schedule as determined by the setting in the Enter by section.

### Tips for Manually Scheduling 1 Student

- In the School Timetable window, display all courses requested by selecting Superimpose All in the Class Display Mode section. This view shows you which periods have the fewest conflicts.
- In the Student Timetable window, select Superimpose in the Class Display Mode section to display only courses requested by the student and selected in the List of Courses. Use this view to examine problem courses or multiple-section courses before scheduling sections for the student.
- Display block letters to understand how single periods can be scheduled by selecting Blocks in the Class Display Mode section.
- Use F3 and F4 to go through the student list.
- Schedule all classes that are colored red before scheduling students into them. Those classes do not have a teacher and/or room scheduled for all the periods or terms in which they are taught.

### Manually Scheduling Many Students (Multi-pasting)

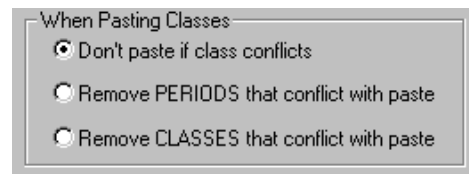
By pasting, you can schedule 1 or more students into a class. If that class conflicts with an already scheduled class, it will not be added to the student timetable.

You can also copy the entire timetable, or the timetable and the request list belonging to 1 student, and give it to 1 or more other students, replacing whatever they had.

Use this procedure when groups of students stay together during the day, moving from class to class together.

Multi-pasting classes overrides the class capacity you set in Details. Monitor the Students column in the Classes Main window to check that you don't schedule too many students into a class.

In Preferences from the Edit menu, select an option in "When Pasting Classes" to control how conflicting classes are handled when you paste. If you select "Remove PERIODS that conflict with paste" or "Remove CLASSES that conflict with paste," any classes conflicting with the class being pasted are removed from the schedule.



Be very cautious when changing Preferences. Changes to preferences can cause unwanted results in student timetables.

**To add to several student timetables at the same time:**

- 1 Highlight a class in the Classes Main window.

OR

To copy a timetable and/or request list from 1 student to several others, highlight the source student in the Students Main window.

- 2 From the Edit menu, choose Copy.

If you are copying a timetable and/or request list from a student, select Requests and/or Timetable. Click OK.

- 3 To display the current contents of the clipboard, click the Information icon in the title bar of any window.

- 4 Select the destination students in the Students Main window.

- 5 From the Edit menu, choose Multi-Paste. Click OK.

If the “Don’t paste if class conflicts” preference is selected, and you paste students into a class, all students you attempt to paste are placed in the Student Subset, and those who had conflicting classes remain selected.

A message reports the number of students who had conflicts and were not pasted into the class.

- 6 Edit timetables manually to resolve the conflicts.

- 7 If you are pasting classes, and you chose to overwrite conflicting classes in Preferences, the students that were pasted-to are placed in the Student Subset.

## **Assigning Students**

Assign Students from the Schedule menu fills as many unfilled course requests as possible for selected students. Requests for required courses are filled before electives. Classes already scheduled are not affected. If you have scheduled any part of a requested class, that request is filled.

If you want to assign Fragmented course requests, you must remove duplicate requests before assigning students or Schedule Credits will be incorrect. See “Scheduling Fragmented Course Requests” on page 71.

See the Win School System Administrator Guide for tips on how to Assign Students for each scheduling run. See also “Assign Students” on page 78 for a complete description.

**To Assign Students:**

- 1 Select some students in the Student window.
- 2 From the Schedule menu, choose Assign Students.
- 3 In the Assign Students dialog, select the options you wish to use, select periods and terms at the bottom, then click OK.

Assign Students is restricted to making changes to Student Timetables in the periods and terms you select.

- 4 If Assign Students fails to schedule any students in 1 or more classes, see “Fixing Assign Students Problems” on page 61.

### Tips on Assigning Students

- Select “Use Backtracking” to find the schedule that fills the most requests. This option can be slow, so deselect it when you are not scheduling multi-section courses.

For best results, before using this option, clear the student timetable by choosing Clear from the Schedule menu.

- If your students have alternate requests, choose Scheduled < Requested from the Lists menu to display a sub-set of the students who could not get into all the courses they requested.

Select all those students, and run Assign Students again with “Use Backtracking” deselected and “Use alternates” selected. Assign Students schedules alternate requests into available periods.

- When setting Class Overfilling, consider the room capacity and the maximum class size you set for each course in Details. If you set overfilling at 10%, Assign Students can place up to 33 students in a class whose capacity is 30. We recommend you set 10% when first using Assign Students, then if necessary, manually remove students near the end of your scheduling run.

## Fixing Assign Students Problems

### If Assign Students places no student in 1 or more classes:

- 1 From the Schedule menu, choose Assign Students.
- 2 If “Use selected courses only” is selected, either deselect it or select all courses in the Courses Main window.  
  
If classes are scheduled in a term or period that is not selected in the Assign Students dialog, Assign Students is restricted to making Student Timetable changes in selected periods and terms.
- 3 From the Windows menu, choose School Timetable.  
  
Classes displayed in color are not fully scheduled.  
  
Assign Students places students in fully scheduled classes only, unless you selected “Allow partially scheduled classes” in Assign Students.
- 4 Schedule the class or classes manually.
- 5 Select the Classes Main window. If the Students column show of 0, that class has a capacity of 0.  
  
Make sure Room Capacity in School Setup is correct.

## Resolving Scheduling Conflicts

If, after running Assign Students, some students do not have a complete timetable, resolve their scheduling problems by manually scheduling them.

## Assigning Study Halls

When you have scheduled all classes into student timetables, you might be left with some periods still marked Free. You can place students in Study Hall classes in these periods.

Use Assign Study after students have been scheduled into all their classes.

### To assign Study Hall:

- 1 In Course Details, create a Study Hall course. In the Scheduler tab, enter 1 (one) for length. In the Periods tab, enter 1 (one) for unique block letters, spread, and periods per day.
- 2 In Scheduler, do not enter any requests for Study Hall.
- 3 In the Main window, click the Information icon to see the number of block-terms.  
  
You need the minimum number of sections of Study Hall. If you have 16 blocks and 2 terms, you will need 32 sections of Study Hall to offer it every period.
- 4 In the Sections window, manually create the required number of sections of Study Hall. Schedule at least 1 section of Study Hall into every period of each term.

- 5 In the Students Main window, select students.
- 6 In Courses view, highlight the Study Hall course you created in Step 1.
- 7 From the Schedule menu, choose Assign Study.

## Monitoring the Assign Students Process

To track progress when assigning students, use these Scheduler features.

### Viewing the Performance Window

From the Windows menu, choose Performance to display performance measures. Other parts of this report relate to the school timetable.

Indicator	Where to Find it in the Performance Window
Number of requests by course	Courses view—Requests column
Total number of students scheduled for all sections based on this course	Courses view—Scheduled column
Total student requests	Summary view—Requests row
Requests that have been scheduled	Summary view—Requests Scheduled row
Students who are scheduled into at least as many credits as they have requested	Summary view—Fully Scheduled Students row
Students with enough credits scheduled to meeting their program credit requirement	Summary view—Students Meeting Requirements row
Average class size	Summary view—Average Class Size row
Average number of students that have classes scheduled in a given block	Summary view—Students Busy row

Course Name	Scheduled	Percent	Usage
Adv. Spanish	7	87%	<div style="width: 87%;"></div>
Algebra 11	26	86%	<div style="width: 86%;"></div>
Algebra 12	38	100%	<div style="width: 100%;"></div>
Biology 11	4	100%	<div style="width: 100%;"></div>
Biology 12	14	100%	<div style="width: 100%;"></div>
Biology Lab 11	3	100%	<div style="width: 100%;"></div>
Bookkeeping 11	21	100%	<div style="width: 100%;"></div>
Calculus 12	38	100%	<div style="width: 100%;"></div>
Chemistry 11	7	100%	<div style="width: 100%;"></div>
Chemistry 12	16	100%	<div style="width: 100%;"></div>
Computer Science 11	0	0%	<div style="width: 0%;"></div>
Drafting 12	16	100%	<div style="width: 100%;"></div>

Percent in the Courses view is the principal measure of scheduling success. It represents the total number of students scheduled for all sections of the course, divided by the total number of requests for that course.

Usage is a representation of Percent. A number of 90% or higher is very good. Don't expect to see 100% unless you have very simple, fixed student timetables. Also, remember that when you manually schedule a class into a student timetable to replace a class that would not fit, that student might be fully scheduled, but he or she still has an unfilled request. As a result, after you have manually edited student timetables, your students will be more scheduled than suggested by the figure in the Percent column.

### Viewing Unscheduled Students

The Req Sch Rqd column in the Students Main window reports the number of credits scheduled for each student.

Use Scheduled < Required and Scheduled < Requested from the Lists menu to examine students who aren't fully scheduled.

If you are using Fragmented (term-based) Course Requests, these columns reflect the requested terms.

Use Timetable Problems from the Lists menu to find scheduled students who lack prerequisites, co-requisites, or gender requirements.

## Generating Scheduler Reports

You can generate reports to show the schedule and scheduling status of your school. The Reports menu lists these reports under 4 columns.

<b>Report</b>	<b>Menu Column</b>	<b>Description</b>
Class Rosters	Lists	Lists all the students enrolled in a class, for term(s) selected in Print terms of the Print Options dialog. Class Roster from the Lists menu in the Main window creates a Student Subset.
Teacher Rosters	Lists	Produces the Class Rosters Report of classes for selected teacher. Each class is printed on a separate page, by teacher. Select Print Blocks in the Print Options dialog to print all blocks and their scheduled teachers, rooms, and number of enrolled students.
Free Students	Lists	Lists free students by block.
Block Capacities	Lists	If the Seats Filled column reaches 100%, and some students are still unscheduled in that block, schedule another class in that block.
Check Requests	Special	Checks student requests, listing filled and unfilled primary and alternate requests, with reasons for unfilled. If the class could be scheduled but is not, Scheduled column shows N.
Student Locations	Special	Prints an alphabetical list of selected students and the rooms they are scheduled into in each block.
Ethnic Mix	Special	Produces gender and ethnic category statistics for selected students. Select all students in a class roster to generate statistics for that class.
Check Timetables	Special	Checks timetables for selected students, listing students, with class names, who lack prerequisite, co-requisite, or gender requirements.
Student	Timetable	Prints selected students' timetables in various formats, according to selected Print Options.

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## Step 6: Starting the School Year

At the beginning of the school year, perform the following procedures.

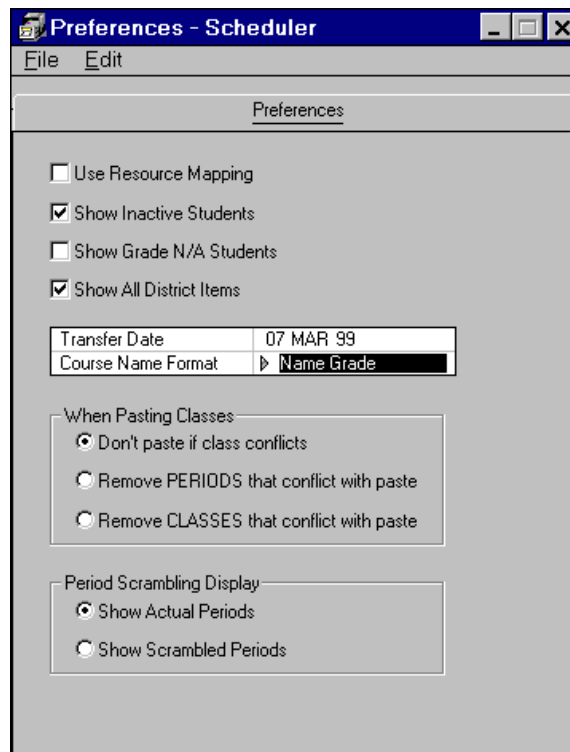
### Printing Timetables and Class Rosters

Print teacher and student timetables, and class rosters. Continue to print these reports as students enroll or change timetables.

Before printing, set up your preferences and print options.

#### To set up preferences and print options:

- From the Edit menu, choose Preferences, then set up the following information:
  - If you used Resource Mapping (cloned rooms and/or teachers, and linked courses), select “Use Resource Mapping.”
  - If you have scheduled students into classes taught at other schools, select “Show All District Items.”
  - To show when classes actually meet, or if you used period scrambling, select “Show Actual Periods.”



- If you store printed reports in a binder, set the left margin to at least 1 inch. From the System menu in the Shell, choose Margin Setup.

**To print student or teacher timetables, or class rosters:**

- 1 Select students or teachers in the Students, Teachers, or Classes Main window.
- 2 From the Reports menu choose a report.
- 3 In the Print Options dialog:
  - select the items you want printed
  - select the Timetable days and Print terms to include in the timetable
  - if you want to print a message on student timetables, type it in the Report Message text box
- 4 Click OK.

**Recording Transfers**

If you use Transfer Recording in School Setup to keep timetable and class roster history, Scheduler keeps track of which classes students are in on specific dates.

This information is called Historical student timetables and Historical class rosters. Attendance uses this information to show, for example, that a student's Period 3 attendance was for Sewing in September, even though she later transferred into Metalwork.

If your school allows class transfers during the first weeks of the school year, you might prefer to turn off Transfer Recording until the schedule is stable.

See Transfer Recording in the School Setup Guide for more information.

**To record student transfers:**

- In School Setup, choose Transfer Recording from the School menu. Then select options.

**To edit or delete transfers:**

- Use the Student Timetable window in Scheduler. See "Student Timetable" on page 106.

---

## Step 7: Changing Information During the Year

When the school year is underway, you can edit student timetables, enroll new students, and make minor changes to the school timetable.

When editing information after school starts, be aware of the Transfer Date, as described in the following procedures.

For each teacher whose class roster changed, the Today's Add/Drop report from the Reports/Lists menu shows the students added or removed.

## Editing the School Timetable after School Starts

When you have scheduled students into a class, you must use these procedures to reschedule or edit your school timetable. Otherwise, students will lose the class held in the period you edited, even if you reschedule the class into the same period or another period.

### Before rescheduling a class in the school timetable:

- 1 From the Edit menu, choose Preferences.
- 2 Set the Transfer Date to the last day students take the class in its current timeslot. If the class is in a term that has not begun, use the current date. Close and save Preferences.
- 3 In the Classes Main window, select a class. Then create a Student Subset containing the class roster by right-double-clicking the class.
- 4 Select all students in the subset, then from the Schedule menu, choose Clear.
- 5 In the Clear dialog, select “Clear selected classes from student timetables,” select the terms to be cleared. Click Clear.
- 6 Reschedule the class by choosing School Timetable from the Windows menu and removing the class. Any students in the class will also be removed from it.
- 7 Schedule the class. See “Manually Scheduling Classes” on page 40.
- 8 Reschedule students into the class by highlighting the rescheduled class and choosing Copy from the Edit menu. Then select all the students in the Student Subset and choose Multi-Paste from the Edit menu. All students free at the new time the class is taught will be scheduled into the class.

If you remove any block of a class from the schedule, or change its teaching time, all students scheduled in that class are removed from that block. These students will miss 1 block of the class, but as long as they are enrolled in any block of the class, Scheduler assumes that their request for the class is filled.

## Editing Student Timetables after School Starts

The most flexible way to change student timetables is to use the Student Timetable window. When using this window, click “View Transfers” to print a Transfers Report before and after making changes. The report verifies the changes.

If you use Transfer Recording in School Setup to track timetable and class roster history, Scheduler records the dates students are in each class. Attendance can then determine class attendance from period attendance.

### Selecting a Transfer Date

When you change a student timetable, the student's first day with the new timetable can be your choice of:

- The Start Date for Change, if you make the change from the Student Timetable window.
- The Transfer Date, if you use any other methods of changing student timetables, such as Paste and Multi-Paste.

#### To change the transfer date:

- In the Student Timetable window, click "Start Date for Change" and edit the date.

When changing a student timetable in the Student Timetable window, always start with the oldest change, and ensure the timetable is correct from then to the current date. When you change a timetable, the change affects that period from the Start Date for Change to the end of the year or term. It overwrites any later transfers for that period.

- From any other window, choose Preferences from the Edit menu and edit the Transfer Date.

#### Example of Student Transfer Dates:

In Block A, Chris can take either Geography, Sewing, or Math.

- Chris started the year in Geography.
- On September 30, he transferred to Sewing.
- On October 30, he transferred to Math.

In December, you notice that you had mistakenly transferred Chris into Sewing on October 2 instead of September 30. You can correct that date, setting it to September 30. However, you must remember to put Chris back in Math as of October 30.

To find and highlight a class in the class pool, control-click the class name in the lower half of the window.

## Changing a Teacher or Room after School Starts

#### To change a teacher or a room:

- 1 To add a new teacher or room, in Details, choose New from the File menu. Enter the new teacher or room information.
- 2 Open Scheduler in Master mode.
- 3 From the Windows menu, choose School Timetable. In the Enter by section, select the term or other timeframe.
- 4 In the Class Name list, highlight the class for the new teacher.
- 5 In the Class Timetable list, highlight the class to be scheduled.

- 6 In the Teacher Name list, double-click the name of the new teacher.  
OR  
In the Room Name list, double-click the new room.
- 7 If the original teacher will not be active for the rest of the year, return to Details. Change “Active” in the Personal tab to No, and enter the date the teacher becomes inactive.

### Scheduling New Students after School Starts

To schedule a new student after the school year has started:

- 1 In the Students view, double-click the name of the new student to display the Student Timetable window.
- 2 Click “Start Date for Change” and set the date to the new student’s first day of school.

Class Name	Status	Period	Students
Adv. Spanish (1)	Can Take	3	9 of 30
Algebra 11 (1)	Requests	N/A	0 of 28
Algebra 12 (1)	Requests	N/A	0 of 30
Algebra 12 (2)	Requests	N/A	0 of 30
Algebra 11 (2)	Can Take	1	12 of 28
Biology 11 (1)	Requests	CoReq: Biology Lab 11	N/A 0 of 25
Biology 12 (1)	Requests	PreReq: Biology 11	N/A 0 of 30

Period	Day 1	Day 2	Day 3	Day 4	Day 5
1					
2					
3					
4					
5					
6					
7					
8					

- 3 Enter a timetable for the student. See “Manually Scheduling 1 Student” on page 55.  
OR

Enter requests for that student, then select the student in the Student Main view. From the Schedule menu, choose Assign Students.

## Transferring Student Marks to Another Class

You can transfer a student's marks from 1 class to another. When a student transfers out of a class in 1 term and into another section of the class in the next term, schedule the student into the new class, then use Transfer Marks to move the marks.

### To transfer a student's marks:

- 1 Use the procedure, "Editing Student Timetables after School Starts" on page 67 to add a new class to the student timetable.
- 2 After the new class has been scheduled, in the Student Timetable dialog, click "Transfer Marks."
- 3 Select "Show all active classes" at the bottom of the Transfer Marks dialog.

The left column displays Source Classes in which the student is currently enrolled and/or has marks. This should include the newly-scheduled class.

The center column displays the Status of each class for that student.

The right column, Destination Classes, is initially empty.

- 4 From the Destination Classes popup, select the class to receive the transferred marks from the Source Class. You can select a Destination Class only once.
- 5 If you want to replace existing bin marks, select "Overwrite bins with existing marks," then click OK.
- 6 Check the Report Card bins to ensure all marks have been transferred.

## Printing Today's Add/Drop Report

For each teacher whose class roster changed on the current transfer date, Today's Add/Drop report lists the students who were added to or removed from each class the teacher teaches.

### To print the Today's Add/Drop report:

- 1 From the Edit menu, choose Preferences and enter the Transfer Date for which you want to print the report. Close Preferences and click Yes to save your changes.
- 2 From the Reports/Lists menu, choose Today's Add/Drop.

Generate a Student Subset containing the students who entered or left a class on the currently selected transfer date by choosing Changed from the Lists menu.

# Scheduling Fragmented Course Requests

---

## Overview

Fragmented course requests allow students to request 1 or more terms of a course. If a student cannot take all the terms of a course in 1 year, the student can request specific terms of the course.

Use Fragmented Course Requests when a student requests 1 or more terms of a course out of the order in which it is offered.

For example, if a student's schedule can accommodate Algebra 10 in the first term but not the second term, Fragmented Course Requests allows the student to request term 2 of Algebra 10 in another year.

Fragmented Course Requests is useful for courses not offered every year or every term. If parts of a course are taught in different years, schedule students into one part of the course this year, and the next part of the course in another year.

Use Fragmented Course Requests in the following situations:

- A student needs to repeat only some terms of a course, not the entire course.
- A student cannot take all terms of a course consecutively due to scheduling conflicts.
- Different terms of a course are offered in different years.

If you use Fragmented Course Requests, you must remove duplicate requests before assigning students and entering fragmented requests.

---

## Preparing to Assign Fragmented Course Requests

**To set up for fragmented course requests:**

- 1 Assign requested courses as you normally would. See “Step 1: Entering Student Requests” on page 16.
- 2 If necessary, remove duplicate requests. See “Removing Duplicate Requests” on page 20.

---

## Assigning Term-Based Student Requests

When you have assigned requested courses and removed duplicates, you can assign terms to student requests.

**To enter terms for student requests:**

- 1 In the Students Main window, right-double-click on a student, or highlight a student and choose Student Requests from the Windows menu.
- 2 In the lower list, click the Linked Alternates VCR button, and choose Terms.  
Initially, all terms for that student's course requests are highlighted. Terms not defined in School Setup are dimmed.
- 3 To remove a request for a term, click on the term number to deselect it. Use F3 and F4 to move back and forth between students.
- 4 In the top right of the Student Requests window, select Requests using the VCR buttons to show the total number of requests, including fragmented requests.

For example, if there are 10 requests for the full year and 2 requests for part of the year, that column shows 12.

**Setting Sections for Fragmented Requests**

You should check the number of sections per term to make sure it is correct. When scheduling a different number of requests for different terms, Scheduler might create more sections than is needed. Change the number of sections in terms that have too many or too few sections. See "Editing Section Information" on page 27.

In the Sections window, use the VCR buttons in the top right area to choose either "Sections Set Per Term" or "Course Request Totals Per Term."

Course Request Totals Per Term is the number of students requesting that course for that term. Use this total to determine how many sections are needed for each course.

**Assigning Students**

Use Assign Students from the Schedule menu as you normally would. Students are assigned according to their term-based course requests.

**Using Students View**

The Req, Sch, and Rqd columns are based on requested terms. For example, if a student requested 2 terms of a 2 term course, but can only be scheduled into 1 term, the Sch column shows half the credit for that request.

## Using Courses View

In the Courses view, you can use the VCR buttons in the third column to select Requests Per Term. This column is divided into terms to show how many students have requested a course in each term.

## Using Student Timetable

Use the Student Timetable window to check and modify a student's timetable for each term.

### Viewing the Terms Requested Column

In the third column in the top list, use the VCR buttons to view Terms Requested, which shows the terms the student has requested the course.

If the student has a request for the class, this column shows the terms requested. If none of the terms are selected, the student has not requested the course.

If a student requested a class but did not request any terms for that class, this column shows "No Terms Selected."

### Reading the Status Column

The left side of the Status column shows any problems with scheduling term-based course requests.

Partial	The student is not scheduled into all requested terms. For example, a student requests all terms of a course but is not scheduled into all terms; or if a student requests 3 terms of a 4 term course and is scheduled into fewer than 3 terms. In both cases, the Status is Partial.
Problem	The student is scheduled into a term that is not a requested term.
Requests	None of the requested terms match the terms the class is taught.
Taking	The student's requests are scheduled.

### Checking for Scheduling Conflicts

An easy way to check for scheduling conflicts is to display Terms Requested in the third column and Terms Taught in the fourth column, then check the Status column for problems.

In the Enter by section at the top of the Student Timetable window, select Term to schedule students by term. Select Year to schedule students into all the requested terms.

**Student Timetable (Actual Periods)** Scheduler

Parsons, Polly  
Grade: 11  
Ethnic Cat: Caucasian  
Requested Credits: 4.25  
Scheduled Credits: 1.25  
Required Credits: 7.2  
Normal Program: Academic  
Special Program: Accelerated

**Display Mode:**  
Classes Blocks Superimp.

**View Classes:**  
In School In Period Requested Labels

**Enter by:**  
Block Period Term Year

**Timetable Term:**  
1 2 3 4 5

Transfer Marks

Start Date for Change:  
24 MAR 99

View Transfers

Class Name	Status	Terms Requested	Terms Taught
Chemistry 12 (1)	Can Take	PreReq:Chemistry 11	1/2
Chemistry 11 (1)	Requests	CoReq: Algebra 11	No Terms Selected
Computer Science 11 (1)	Can Take		1/2
Computer Science 11 (2)	Busy		1/2
Drafting 12 (1)	Problem	PreReq:Algebra 12	5
English 11 (1)	Partial		1/2
English 11 (2)	(1)		1/2

Period	Day 1	Day 2	Day 3	Day 4	Day 5
1					
2					
3					
4					
5					
6	Biology 11 (1)	Biology 11 (1)	Biology 11 (1)	Biology 11 (1)	Biology 11 (1)
7					
8					

## Generating Reports about Fragmented Course Requests

The following reports show the terms of fragmented course requests:

- Student Requests
- Course Request Tally
- Wait Lists
- Class Rosters
- Brief Requests
- Check Requests

For more information on reports, see “Printing Reports” on page 96.

## Generating the Term-Based Conflict Matrix Report

The Term-based Conflict Matrix Report is only for viewing conflicts in selected terms. To make changes to the schedule, use the Conflict Matrix window from the Windows menu.

### To generate a term-based conflict matrix report for selected terms:

- 1 From the Reports/Special menu, choose Term-based Conflict Matrix. The Select Terms dialog appears.

- 2 Select terms and click OK.

The title bar of the Conflict Matrix Report shows the terms of this report.

- 3 To print this report, choose Print from the System menu.

# Using Windows and Functions

---

## Overview

In this section, Scheduler windows and functions are described in alphabetical order.

If fields for a window are described, they are in order from top to bottom, left to right, as they appear in the window.

---

## Assign Aides

Assign Aides is only available when Scheduler is in Master Mode.

You can assign aides any time after scheduling all classes that need teaching aides. Do not enter course or room preferences unless the aide is also a teacher and teaches courses.

### To assign aides:

- 1 In Course Details, Scheduler tab, select the Aide Type.
  - 2 In Teacher Details, select Scheduler tab.
  - 3 In “Scheduling Teacher Type,” select Teaching Aide for each staff member acting as a teacher aide, then select an Aide Type.
  - 4 In Scheduler, build your school timetable as usual.
  - 5 In the Courses Main window, select all courses. Then from the Schedule menu, choose Assign Aides and select options.
  - 6 Click Load. To view or manually edit teaching aides, use School Timetable from the Windows menu.
- 

## Assign Homerooms

Assign homerooms after the school timetable is complete and students are scheduled.

For a room to be a homeroom, in School Setup, Rooms menu, choose Room Setup, then select Yes in “Use as HRoom.”

Select homeroom numbers or assign selected students to a homeroom based on a timeslot and/or a class.

Homeroom numbers assigned with Assign Homerooms are independent of scheduled homeroom courses. These homeroom numbers can help to schedule students into a homeroom class.

---

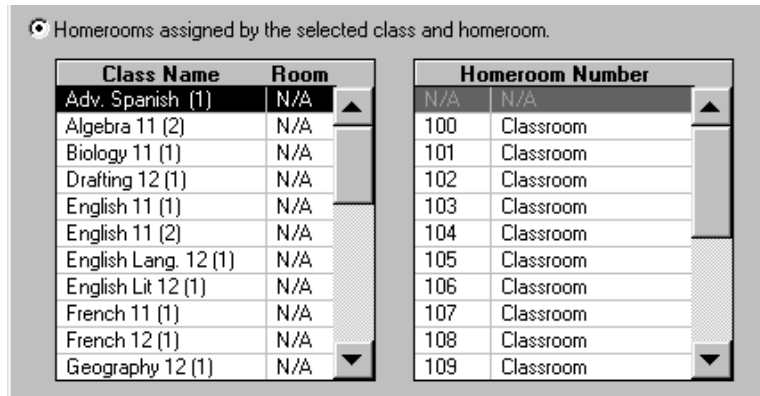
If you re-assign homerooms for a new term, and Transfer Recording is turned on, the new homeroom assignment appears the next day.

## Assigning Homerooms by Selected Class and Homeroom

You can assign homerooms to selected students taking the classes you specify. You can place students either into homerooms you specify, or use Win School to automatically schedule the homerooms. Later, override those assignments for selected classes.

### To assign homerooms by selected class and homeroom:

- 1 Select students, then from the Schedule menu, choose Assign Homerooms.
- 2 Select the third option: “Homerooms assigned by the selected class and homeroom.”



- 3 Highlight a class to the left, and on the right, right-double-click a homeroom number.
- 4 Repeat as necessary.

Use the “Homerooms assigned to the class that selected students are taking in the following term, day, and period” option carefully when processing more than 1 class at a time. Assign Homerooms works through the Class Pool alphabetically, placing students as specified. Students in the class roster of more than 1 of these classes end up in the homeroom associated with the last class they are taking that is processed.

To use this option, select all students so that entire class rosters are assigned to homerooms.

When you assign a homeroom associated with a specific class, the selected students are first put into a subset student list, then assigned a homeroom based on the specified class. If a student does not have a class at the specified time, the student name will stay in the subset list.

If all students have a class in the specified time, the subset list is empty when Scheduler completes assigning homerooms.

## Assign Students

Assign Students from the Schedule menu contains all the options used to assign students to classes.

See “Assigning Students” on page 59 for details on how to assign students. This section describes some options in the Assign Students dialog.

**Assign Students**

Class Overfilling  %

Maximum time per student (sec. eg: 90)

Use Backtracking

Use selected courses only

Use alternates

Allow partially scheduled classes

Maximum of one course per department per term

Schedule students into clusters

Choose sections according to Linked Groups and Following Triplets

Enforce prerequisite rules

Periods

1	2	3	4	5	6	7	8				

Terms

1	2										

Cancel OK

### Allow Partially Scheduled Classes

Normally, Assign Students does not place students in classes that are not fully scheduled. This option overrides that restriction.

Assign Students considers a class fully scheduled if all the meeting times for the class have been scheduled in the correct number of terms. If Teacher Required and Room Required are selected for that course in Details, then all of those classes must have teachers and rooms.

Use this option if the room or teacher is left unassigned because it is still undetermined, or if 1 or more terms won't be scheduled until a later date.

### Choose Sections According to Linked Groups and Following Triplets

If this option is selected, Assign Students places students in consecutive sections of classes in Following Triplets, and in the same sections of Linked Groups taught in the same period but on different days or terms.

If this option is not selected, students are scheduled in any section of the courses they request. For example, they might not be scheduled into consecutive sections of a Following Triplets.

Select this option if you want students placed in sections according to Linked Group and Following Triplets patterns.

Deselect it to schedule students into Linked Group courses that are taught simultaneously. In this case, the student can't be in 2 places at once and must take sections that do not follow the Linked Group pattern.

### **Enforce Prerequisite Rules**

Enforce prerequisite rules does not check student historical data for prerequisites, only the courses actually being requested by each student are considered.

Use this option if you have set prerequisite requirements for courses in Details, and you want Scheduler to check those requirements against a student's requests before assigning them.

This is useful when students complete a course in 1 semester.

### **Maximum of One Course Per Department Per Term**

This option forces Assign Students to place students in a maximum of 1 course from a department in each term.

For schools that want to balance the content of student curriculum, this option checks that students don't get all their art courses in 1 term, and all their science courses in another. You can remove this restriction later to try to fill remaining unfilled requests.

To be successful with this option, check that your school timetable will accommodate the restriction.

Your school must have a fairly large number of departments: at least 1 department for each course that a student normally takes in a term.

You can run Assign Students initially with this option selected, which should distribute most courses across the terms. Then, either manually schedule the remaining classes or run Assign Students a second time with this option deselected.

### **Schedule Students into Clusters**

Selects sections of courses for students to take according to Clusters & Teams settings.

When you select this option, we recommend you also select "Use Backtracking" and deselect "Use alternates." To schedule student alternate requests, run Assign Students once with this option selected to place your students in clustered classes. Run it again with "Schedule students into clusters" and "Use Backtracking" deselected, and "Use alternates" selected.

If you have created clusters in the Clusters & Teams dialog, select this option before running Assign Students.

### **Use Alternates**

If all primary requests could not be filled, Assign Students tries to schedule alternate requests.

If “Use selected courses only” is selected, Assign Students will not fill Global Alternate requests.

If you have entered alternate requests, select this option. Some schools prefer to schedule students into as many classes as possible without considering alternates, then run Assign Students again using alternates.

### **Use Backtracking**

Assign Students experiments with the different possible schedules allowed by multi-section courses to find the schedule that fills the most requests. Therefore, the more class options students have, the more timetable configurations are possible.

Increase the backtracking time spent on analyzing each student to provide the best possible scheduling.

Because this option slows the Assign Students process, deselect it when you are testing your school timetable.

When you are satisfied your school timetable is satisfactory, clear timetables with Change Students from the Schedule menu. Then select all students and run Assign Students with Use Backtracking. Assign Students uses every means at its disposal to schedule students into their first-choice required and elective classes.

### **Use Selected Courses Only**

Assign Students fills requests only for courses selected in the Courses Main window. Neither linked nor global alternate requests are filled.

This option is useful for scheduling students into single- or double-section courses.

Use it early in your scheduling process to give high priority to certain course requests. Otherwise, Assign Students gives priority to required courses over electives.

If you have cleared students from some courses, select this option and those courses to assign students to only those courses, and to reschedule them in the school timetable.

---

## Change Students

Select students in the Students Main window, and choose Change Students from the Schedule menu. You can change the selected students' timetables, including creating or deleting requests.

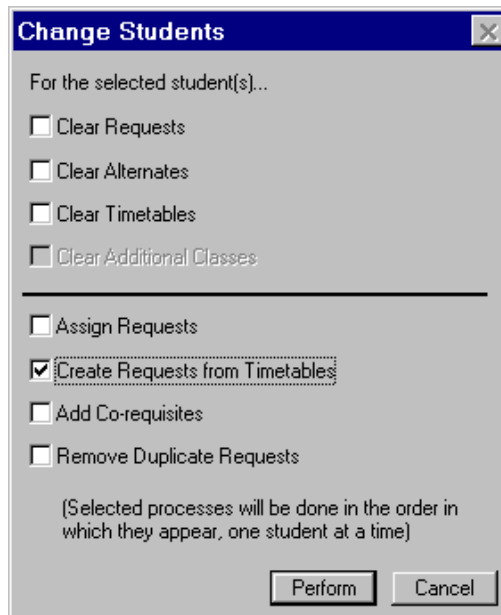
### Create Requests from Timetables

Use this option to give students requests for the classes they are currently taking. This option is designed for schools that created their school timetables manually without entering student requests, and want to experiment with using Create Timetable and Assign Students to build timetables.

Use this option after your student timetables have been created, and after you have made a copy of your existing data files. Schools that need an accurate conflict matrix to generate an exam schedule can use this function at the end of a term or semester.

#### To create requests from timetables:

- 1 Make a copy of your existing data sub-folder. The path to your existing data sub-folder is shown in Win School Shell, after "Data Path =."
- 2 In your WINSCHL.INI file, change the DATA= line to point to the new sub-folder.
- 3 For the change to take effect, quit and re-start Win School.
- 4 In the Students Main window, select students.
- 5 From the Schedule menu, choose Change Students, and select Create Requests from Timetables, then click Perform.



That completes the first step of scheduling: Entering Requests. You can now build timetables.

- 6 When you have finished experimenting, change the DATA= statement in your WINSCHL.INI file to point back to your real data sub-folder. Note that you will have to quit Win School and start it again for the change to take effect.

## Clear

Clear, from the Schedule menu, is only available when you started Scheduler in Master mode.

The Clear command can:

- Remove classes or courses from student timetables.
- Remove classes or courses from the school timetable.
- Clear course requests from student request lists.
- Replace cleared course requests with their linked alternates.
- Remove reservation labels from selected room or teacher timetables.

If you clear classes or courses from a student's timetable, the student's requests remain unchanged. If you don't want that student in a class, you must also clear the student request.

If you have changed the school timetable, you might want to remove specific multi-section courses, so Assign Students can re-consider sections to place students. Or use Change Students to clear all classes from selected student timetables.

Clear course requests from student request lists when you have finished scheduling and are certain that the requests can't be filled. Or use Change Students to clear all selected student requests.

Clear reservation labels from rooms and teachers when other commitments no longer prevent them from being scheduled for classes.

## Using the Clear Dialog

### To remove requests for a course:

- 1 Select courses in the Courses Main window, then from the Schedule menu, choose Clear.
- 2 Select "Clear selected courses from student requests lists."
- 3 If you want a linked alternate request to become a primary request, select "Replace first-choice request with its linked alternate."

If you don't select this option, the linked alternate is deleted along with the first-choice request.

- 4 Click Clear.

**To remove classes from student timetables:**

- 1 Select classes in the Classes Main window, then from the Schedule menu, choose Clear.
- 2 Select “Clear selected classes from student timetables,” and highlight terms in the Clear Terms section.  
  
Classes scheduled in selected terms are removed from student timetables. Classes that are not taught in highlighted terms are ignored.
- 3 Click Clear.

**To remove classes or courses from timetables:**

- 1 Select courses or classes, then from the Schedule menu, choose Clear.
- 2 Select “Clear selected courses from school and student timetables” or “Clear selected classes from school and student timetables.”
- 3 To clear locked classes, select “Modify Locked Classes.”
- 4 Highlight terms in the Clear Terms section.  
  
Classes or courses scheduled in selected terms are removed from student timetables. Classes or courses not taught in highlighted terms are ignored.
- 5 Click Clear.

**To clear reservation labels:**

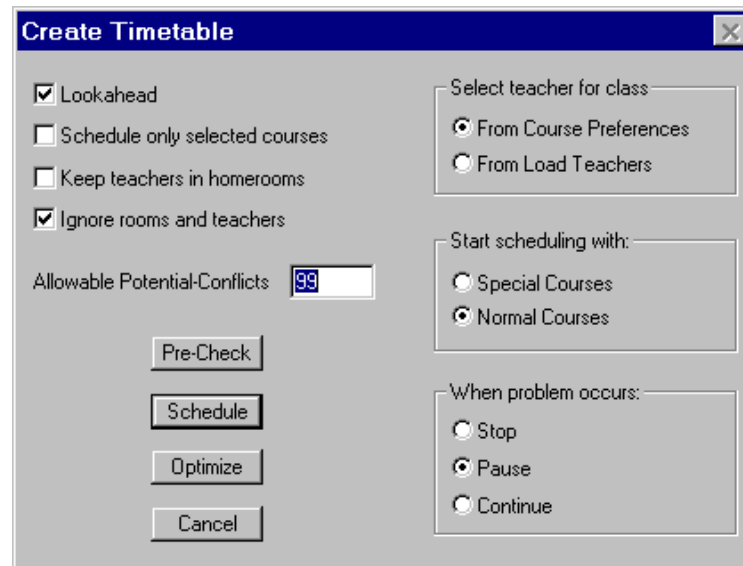
- 1 Select rooms or teachers, then from the Schedule menu, choose Clear.
- 2 Select “Clear reservation labels from selected rooms’ timetables” or “Clear reservation labels from selected teachers’ timetables.”
- 3 To clear all labels except the built-in Reserved label, select “All labels but ‘Reserved’.” Deselect to clear all labels.
- 4 Highlight terms in the Clear Terms section.
- 5 Click Clear.

---

## Create Timetable

Create Timetable is only available in Scheduler Master mode.

This command schedules unlocked classes into the school timetable according to constraints set in Course and Teacher Details. You use Create Timetable more than once to complete the school timetable.



Use Pre-Check before performing an actual scheduling run to discover conflicts in room and teacher selections.

When you click Schedule, classes are scheduled according to their difficulty. Special Courses are scheduled first, unless Normal Courses or Optimize is selected. The rest of the courses are scheduled according to difficulty, from the first sections of all courses, to the second sections of all courses, and so on.

Click Optimize to try to make improvements to the timetable.

Use Create Timetable after you have:

- Entered all student requests.
- Set sections.
- Loaded teachers (optional).
- Manually entered and locked any classes that have to be taught by a particular teacher at a specific time in a specific room.

---

## Data Transfer

Data Transfer is only available in Scheduler Master mode.

Use Data Transfer from the File menu to import or export student timetables in the file formats described below, and class timetables by block or by period. Use Data Transfer to transfer school and/or student timetables between Win School and other automated systems, including Mac School and district mainframe computers.

Import class timetables before using Create Timetable, then use Lock Classes from the Schedule menu to prevent Create Timetable from making any changes to the imported timetable information.

Import student timetables before using Assign Students.

Student timetables can be exported in user-defined formats using ASCII Transfer.

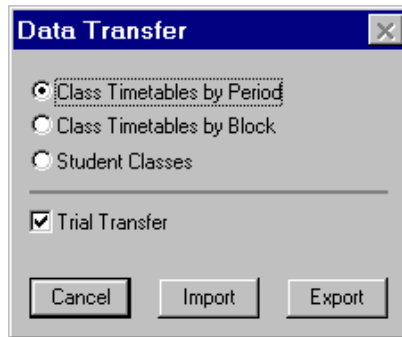
The following sections describe using Data Transfer to import or export data in detail.

## Exporting Scheduler Data

When exporting Class Timetables by Period, the Term numbers are included in the repeating group for each period. The starting period and finishing period are always the same.

### To export Scheduler data:

- 1 Select a few students or classes to be exported.
- 2 From the File menu, choose Data Transfer.
- 3 Select the type of data to be transferred.
- 4 If this transfer is a test, select Trial Transfer, then click Export.



- 5 Check the Export Error Report window to make sure the data exported correctly.
- 6 If the data exported correctly, select all the students or classes to be exported.
- 7 Repeat Steps 2 and 3.
- 8 Provide a name and destination for the export file, then click OK.

The Export Error Report window lists any errors encountered in the process, or verifies that your data was exported correctly. If there are no errors, the data transfer is complete, and you can close the report window.

## Importing Scheduler Data

Before importing any data, make a backup copy of your existing data.

When you import student timetables, no class that is already in a student's timetable is removed during the import. If any block of an imported student

timetable conflicts with a class that is already in that student's timetable, that block is not imported. All, some, or none of a class can be imported. Classes that could not be completely imported into a student's schedule are listed in the Import Error Report.

When you import class timetables, if there is a conflict in 1 or more blocks between a class being imported and an existing class, those blocks will not be scheduled, and the class is included in the Import Error Report. If 1 or more blocks of the imported class can be scheduled, they will be.

You cannot import classes with teacher or room clones, nor import into classes with teacher or room clones. You should manually assign the cloned teachers and rooms after the import.

**To prepare to import Scheduler data:**

- 1 Make a backup copy of your data.
- 2 Put the source file on your PC or on a network your PC can access. Transfer is slower over a network.
- 3 Make sure that all the school IDs and terms for imported data have been set up correctly in School Setup.
- 4 Create all course numbers for imported data in Details.
- 5 If you are importing student timetables, create student numbers in Details.
- 6 Create classes with section numbers in the Scheduler Set Sections window, or import them with the new file.
- 7 If you are importing class timetables, create their room numbers, days, periods, and blocks in School Setup.
- 8 Create Teacher numbers in Details.
- 9 If any class being imported has a section number that does not appear in the Set Sections window, that section number is added automatically.

If a class being imported has a section number that appears in the Set Sections window, the existing schedule for that class is changed to the imported data.

**To import data:**

- 1 Run Scheduler in Master mode. From the File menu, choose Data Transfer, and set options.
- 2 Select Trial Transfer.
- 3 Click Import.
- 4 Specify the name and location of the file you want to import.

An Import Error Report lists any errors encountered during the process, or verifies that your data has been imported correctly.

- 5 If the Import Error Report shows no errors, close it and repeat the process with the Trail Transfer checkbox deselected.

- 6 When the import is finished, the Import Error Report window shows the result. If there are no errors, it will display Data Transfer Complete, and your schedule is assembled.
- 7 Inspect the imported data. If your timetables do not appear accurate, restore your data from the backup and do another trial import to identify the source of the problem.

## Understanding File Format

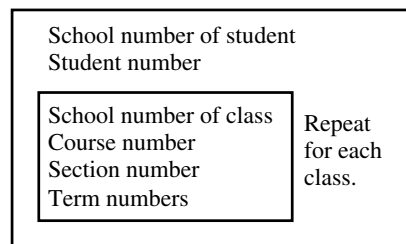
When exporting files, the files are exported in a specific file format. When importing, the data file must follow the format to be imported properly.

Fields are surrounded by quotation marks and separated by commas. Records are separated by carriage returns.

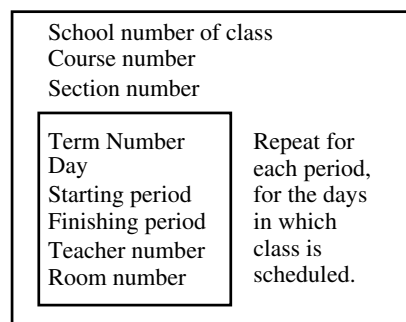
Do a trial export to see what the exported file looks like.

Each record contains the fields shown in the following figure:

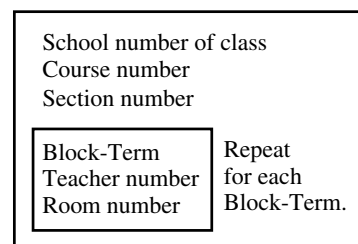
### Student Classes



### Class Timetables by Period



### Class Timetables by Block



For student classes, term numbers are linked in series. A class taught in Terms 1 through 12 will have 123456789ABC in its Terms field.

For class timetables by period or by block, the term or block-term numbers are repeated as indicated by the table above.

Days are indicated by letters:

Abbreviation	Fixed Day	Relative Day
M	Monday, week 1	Day 1
T	Tuesday, week 1	Day 2
W	Wednesday, week 1	Day 3
R	Thursday, week 1	Day 4
F	Friday, week 1	Day 5
S	Saturday, week 1	Day 6
U	Sunday, week 1	Day 7
m	Monday, week 2	Day 8
t	Tuesday, week 2	Day 9
w	Wednesday, week 2	Day 10
r	Thursday, week 2	Day 11
f	Friday, week 2	Day 12
s	Saturday, week 2	Day 13
u	Sunday, week 2	Day 14

A 5-day fixed timetable uses M, T, W, R, and F. A 6-day relative timetable uses M, T, W, R, F, and S, even though it meets Mondays through Fridays only. A 2-week fixed timetable that does not meet on weekends uses M, T, W, R, F, m, t, w, r, and f.

When importing class timetables by period into Win School, you can link days when class timetable elements are repeated. A day field of MWF indicates that on Mondays, Wednesdays, and Fridays, the class is taught with the following time, room, and teacher.

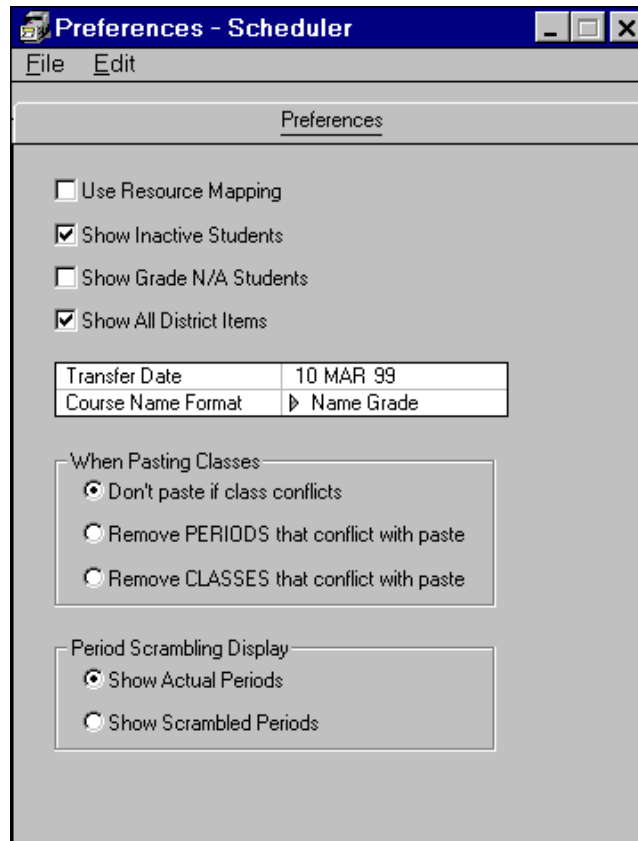
Periods are indicated by numbers. The starting period and finishing period are always the same.

---

## Preferences – Scheduler

From the Edit menu, choose Preferences. You can set Scheduler preferences as well as preferences for Win School : System and Win School : User.

If the window title bar does not show Preferences - Scheduler, choose Scheduler from the Edit menu.



**Use Resource Mapping:** Scheduler replaces cloned teacher and room names with the original names, as defined in Details with Clone Teacher from the File menu, and in School Setup with Room Clone from the Rooms menu.

This option affects all room and teacher names displayed in Scheduler. Select it after all timetables are built and before printing them. Do not select this option while building timetables, as confusion may result from having the same teacher or room appear in a list more than once.

**Show Inactive Students:** show inactive students in Scheduler windows and reports. Select for currently inactive students when scheduling. Students are inactive if their enrollment date has not yet arrived or if they have withdrawn or left. Active status is defined in the Codes tab in Student Details.

**Show Grade N/A Students:** show Grade N/A students in Scheduler windows and reports. Grade levels are assigned to students in the Details Personal or Enrollment tab.

**Show All District Items:** controls the display of data for other schools. Use this option if your students attend classes at other schools and you wish to include this information in your timetables. Select this option to display:

- Teachers assigned to other schools in Details.
- Rooms assigned to other schools in School Setup.

- Courses that have their District Use Only fields set to Yes in the Scheduler tab in Details.

Transfer Date: before changing a student timetable, set the Transfer Date to the first day the student needs the changed timetable. The Transfer Date applies to all methods of changing student timetables except the Student Timetable window. Changes in the Student Timetable window take effect on the Start Date for Change instead of the Transfer Date. The Start Date for Change can be any date. When you change a student timetable using most methods, such as Multi-Paste, the Transfer Date cannot be earlier than the Transfer Date of the most recent timetable change for the student or class.

Remove PERIODS that conflict with paste and Remove CLASSES that conflict with paste: any classes conflicting with the class being pasted are unscheduled according to your selection. Use these features carefully, as you may find periods or classes removed unexpectedly.

Period Scrambling: determines the block arrangement that Scheduler displays and prints. When building the school timetable, select Show Scrambled Periods to display and print the block structure that appears only in Scheduler. Select Show Actual Periods before printing timetables for distribution to students and staff.

## Room Timetables

Room Timetables from the Windows menu lists rooms and timetable blocks, displaying scheduled classes, class names, section numbers, teacher names, and number of students. If no class is scheduled in a room for a particular block, “Free” or the assigned reservation label is displayed.

Print individual room timetables by selecting them in Rooms view and choosing Print from the System menu.

Use View Options from the System menu to display Room Timetable information by block, by term or by period for selected timetable days only. The View Options setting also affects room timetables you print from this window.

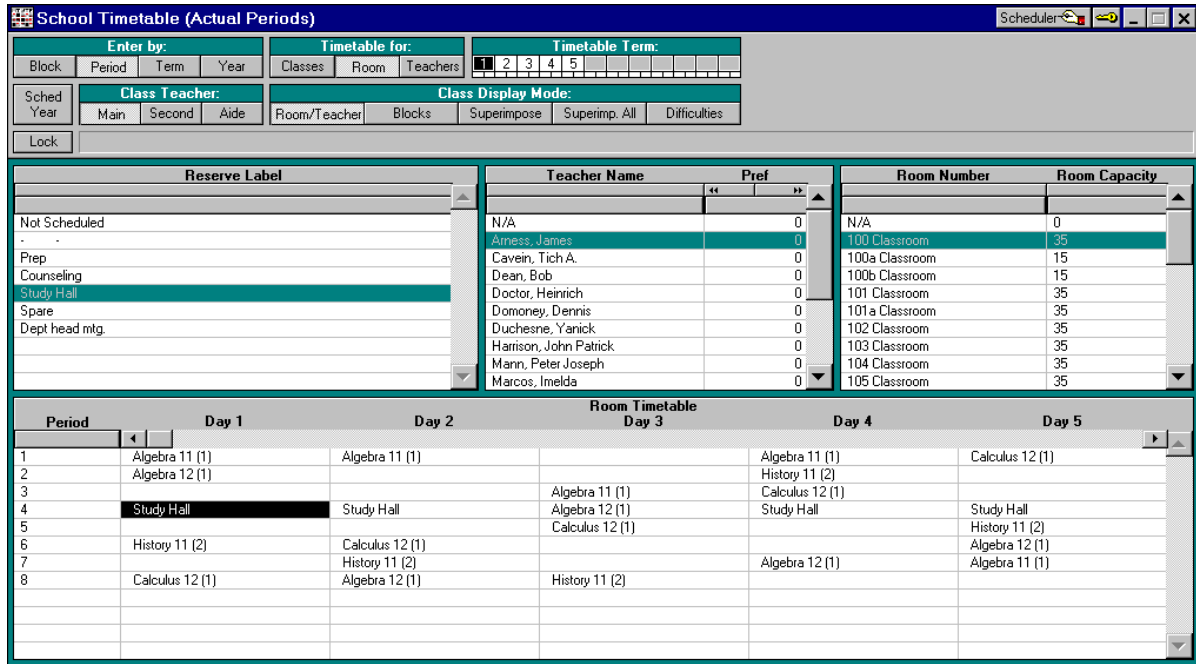
## School Timetable

School Timetable from the Windows menu provides a window for manually scheduling classes, and for reserving teachers and rooms for specific classes and times. You can edit your school timetable in this window.

Select options in the top part of the window to control the display in the lower part of the School Timetable window.

Use the 3 scrollable lists in the middle part of the window to find specific class, teacher, or room information.

Use the bottom section of the window to view and edit class, room, and teacher timetable information. Until a class is fully scheduled in all terms selected in the Sections window, its name is colored in the Class Name column. When a class is fully scheduled for the year, its name is black.



### Using School Timetable Options

The options in the top third of the School Timetable window are in 5 sections.

#### Enter by

Use the Enter by options to select the editing mode for the schedule. For simple timetables, Year is usually selected.

**Block:** any timetable changes made to a block affect only the block in which you make them. This is the only mode in which to schedule classes into blocks that aren't assigned anywhere in the Timetable Structure in School Setup.

If blocks appear more than once in your Timetable Structure dialog in School Setup, and in different periods, the class will be scheduled into that block everywhere it appears regardless of the period. If you are working in Term or Year mode and the class has to be scheduled into more than 1 block, Scheduler picks blocks that first appear in the timetable in the same period, but on different days.

**Period:** for timetables that contain repeated block letters in different periods, this mode is easiest to use. Changes to a period affect only the block you edit. If the block appears only once in the timetable, only that

period is affected. If the block appears more than once, every occurrence is affected by the change.

**Term:** repeats changes made to 1 period, for the same periods on other days in the term highlighted in Timetable Term. Term mode uses only periods highlighted in the course's Periods tab in Details. This mode never exceeds the number of days over which the class should be spread, as defined in the Periods tab in Details.

**Year:** is like Term mode, except that changes are made in all terms in which the course is to be scheduled, according to the Sections window.

### **Timetable for**

Specifies the type of timetable to display in the bottom part of the window: for classes, room, or teachers.

**Classes:** you can edit the times, teacher, and room for the highlighted class.

**Room:** you can assign the Reserve Label to the highlighted room.

**Teachers:** you can assign the Reserve Label to the highlighted teacher in the highlighted room.

### **Timetable Term**

**Term Numbers:** click a term number to display the timetable for that term.

**Term Indicators:** below each term number is a pair of colored rectangles.

You can schedule a class only into terms with green rectangles under the Term Number. If you want to schedule a class into another term, you must change your selections in the Sections window. The left rectangle (Term Indicator) is green if the term is selected in the Set Sections window for the currently highlighted class. The left Term Indicator is white if the term is deselected in the Set Sections window.

The right Term Indicator shows the scheduled status of the highlighted class in that term. It is white when the class is not scheduled in that term, red when it is partially scheduled, and green when it is fully scheduled in that term.

To fully schedule a class for the year, the right Term Indicator must be green in each term that the left rectangle is green.

### **Sched Year Button**

The Sched Year button copies the schedule for the highlighted class for the currently displayed term to all other terms selected for that class. In the Timetable Term section, the left rectangle is green below these terms.

A Confirmation dialog appears when you click Sched Year. To skip this dialog, press Control while you click. Click OK to carry out the operation.

This button is active only when Classes is selected in Timetable For, and the class is scheduled in only 1 term.

### **Class Teacher**

A class can have up to 3 teachers each time it meets.

A teacher can be a different teacher type for different classes. If the selected teacher type has not been assigned, N/A is displayed instead of a name in the Timetable section of the window. The following list describes each teacher type:

**Main:** a class is only fully scheduled with a Main teacher in each timeslot, unless the course does not need a teacher and is set up that way in the Scheduler tab in Course Details. Create Timetable assigns Main teachers only.

**Second:** can only be manually entered in this window.

**Aide:** the Assign Aides command automatically assigns teacher aides to courses.

### **Class Display Mode**

Room/Teacher is usually selected. See “Manually Scheduling Classes” on page 40 for more information on these options.

### **Lock Button**

Use the Lock button to lock a class when you are satisfied with the scheduling. This button is active only when Classes is selected in the Timetable for section. To lock a class, highlight it, then click Lock.

## **Using School Timetable Lists**

### **Class Name**

When Classes is selected in the Timetable for section, the left scrolling list displays classes, with VCR buttons for options.

Use the VCR buttons to select Teaches to show the number of active students a teacher is responsible for in the selected year and term. If a student is in 2 classes taught by the same teacher, that teacher is considered responsible for 2 students.

If you used Class Combining from the Schedule menu to create groups of classes, the combination class names also appear in the class pool.

Class names in color are not fully scheduled. Class names in black are fully scheduled.

A padlock icon in the left margin means a class is locked, and Create Timetable cannot change the schedule of that class.

Left-double-click a class name to highlight the scheduled teacher and room in the teacher and room pools if the class has been at least partially scheduled.

Right-double-click a class name to display the class roster for that class in the Student Subset view of the Main window. This replaces an existing Student Subset with the class roster.

Control-left-click a class name to move the highlight to the next class in the Class Pool that is not fully scheduled.

### **Reserve Label**

When you select Teachers or Room in the Timetable for section, the left scrolling list displays the reservation labels you created in School Setup.

Use reservation labels to prevent a room or teacher from being assigned to a class at a particular time, before you use Create Timetable.

For more information, see “Reserving Teachers and Rooms” on page 39.

### **Teacher Name**

The first column displays teacher names. VCR buttons display teacher numbers, employee numbers, and the teacher’s level of preference to teach the current class in the Class Pool.

Control-left-click a teacher name to move the highlight to the next teacher in the list with a preference to teach the class currently highlighted in the class pool.

The course appears in the teacher’s Preferred Courses list on the Teacher Details Scheduler tab. The names of these teachers are displayed in color in the Teacher Pool.

### **Room Number**

For each room, the room number and its capacity are displayed.

Control-left-click a room name to move the highlight to the next room in the list that is potentially a good room in which to schedule the currently highlighted class and teacher.

Rooms are displayed in color to indicate that both the highlighted teacher and the highlighted class have preferences for the room.

## **Teacher Timetables**

Teacher Timetables from the Windows menu lists teachers and timetable blocks, displaying scheduled classes, class names, section numbers, room numbers, and number of students.

If a teacher is not scheduled to teach a class in a particular block, “Free” or the assigned reservation label is displayed.

Print individual teacher timetables by selecting them in Teachers view and choosing Print from the System menu.

From the System menu, choose View Options to display Teacher Timetable information by block, by term, or by period for selected timetable days only. The View Options setting also affects teacher timetables you print from this window.

---

## Validate

Validate from the Schedule menu verifies the consistency of Scheduler data. A power outage or system failure can affect data. For example, requests in the Main window for some students might not be the same as the Student Requests report.

### To validate Scheduler data:

- 1 From the Schedule menu, choose Validate to adjust inconsistencies in the data.
- 2 From the Reports/Algorithm menu, choose Student Requests.
- 3 After the process is complete, verify that data is correctly displayed in all relevant windows.

---

## View Options

In the Teacher and Room Timetables windows, you can use View Options from the System menu to display by block, by term, or by period for selected timetable days. This command also affects timetables printed from these windows.

Use View Options after creating the school timetable, when you want to scan room/teacher schedules and reservation label assignments by block, by term, or by period for selected timetable days only.

When you select View Options from the System menu, a secondary menu appears to the side. A checkmark indicates the currently selected option.

- by Block displays all blocks from your timetable structure in columns across the timetable window. All blocks are displayed for the first term followed by subsequent terms. The column headings display block letter and term number.
- by Term also displays all blocks, but rearranges the columns by term, so all terms for each block appear before the next block in sequence.
- Monday, or Day 1, etc. depends on timetable structure: fixed days or relative days. Selecting a day from View Options displays timetable information by period for the selected day only, in columns across the timetable window. All periods are displayed for the first term, then subsequent terms. The column headings display day name (or number), period number, and term number.

# Printing Reports

## Overview

Scheduler offers 4 categories of reports from the Reports menu. You can choose Scheduler reports or custom templates that have been created in Report Manager.

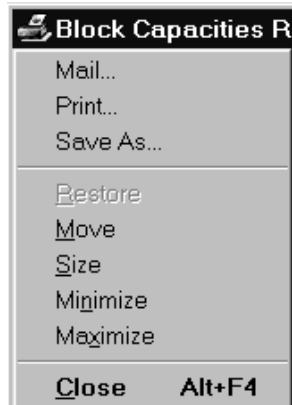
Algorithm	Lists	Timetable	Special
Special Courses	Wait Lists	Course	Check Requests
Resource Check	Class Rosters	Class	Student Locations
Student Requests	Teacher Rosters	Room	Class Blocks
Teacher Loading	Free Students	Student	Period Schedule
Course Loading	Free Rooms	Teacher	Ethnic Mix
Teacher Clusters	Transfers		Equivalent Full Time
Course Request Tally	Today's Add/Drop		Room Preferences
	Block Capacities		Check Timetables
	Student Clusters		Term-based Conflict Matrix
	Brief Requests		Custom Templates...

When you choose a report, Scheduler displays the Print Options dialog. Set print options, and click OK to view the report in print preview. From the print preview, you can print the report, or save it as a file.

## Using the System Menu

Scheduler displays reports in print preview mode first. You can view all pages of the report and decide if you want to print it or save it as a file.

Click the icon at the top left of the window to access the System menu. Use the System menu to print or save the report.



## Block Capacities

Reports/Lists/Block Capacities

Block Capacities Report Chancery Academy										
Block	Grade	Students	Classes	Total Class Capacity		Seats Available		Seats Filled		
A-1	10	2	0	0	0%	0	0%	0	0%	
	11	49	1	28	57%	16	57%	12	42%	
	12	51	2	100	196%	51	51%	49	49%	
	Total	102	3	128	125%	67	52%	61	47%	
B-1	10	2	0	0	0%	0	0%	0	0%	
	11	49	1	15	30%	0	0%	24	160%	
	12	51	0	0	0%	0	0%	0	0%	
	Total	102	1	15	14%	0	0%	24	160%	

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For each grade and for the whole school, the Block Capacities report lists the number of students, the number of classes, the capacity of those classes, and the number of seats divided by the number of students.

This number should generally be above 100%, to allow all students to be scheduled in a class in their grade level in that block. The report also lists the number and percent of seats that are available and the number and percent of seats that are filled for each block and grade.

When you have built your school timetable, check the class capacity to see that enough seats are available for each grade level in each block.

The capacity of a class is either the lesser of the Maximum Class Size entered in Details and the Capacity entered in School Setup for the room in which the class is scheduled, or the Capacity as edited in the Sections window.

As you build student timetables, check the seats available and seats filled statistics to identify problem blocks. Open School Timetable from the Windows menu to see the classes scheduled in each block.

---

## Check Timetables

Reports/Special/Check Timetables

The Check Timetables report lists students who are scheduled into classes for which they lack co-requisite or gender requirements. It lists those classes and the missing requirement.

From the Lists menu, choose Timetable Problems to place all students with specific requirement violations into the Student Subset, so you can easily access and edit them.

---

## Class Blocks

Reports/Special/Class Blocks

The Class Blocks report lists the blocks the class is taught and the student enrollment in each block for selected classes.

Print this report after your school and student timetables have been created.

---

## Conflict Matrix or Term-Based Conflict Matrix

Windows/Conflict Matrix

OR

Reports/Special/Term-based Conflict Matrix

The Conflict Matrix from the Windows menu reflects the school year. The Conflict Matrix report from the Reports/Special menu allows you to select terms, in the event you are using Fragmented (term-based) course requests.

The Term-based Conflict Matrix report from the Reports menu is for reporting conflicts in selected terms only. To make changes to the schedule, use the Conflict Matrix window from the Windows menu.

Single-section classes are most affected by conflicts.

Use the Conflict Matrix report to determine where a class should be scheduled to minimize conflicts when filling student requests. You can look for the least possible conflict in scheduling to the same block.

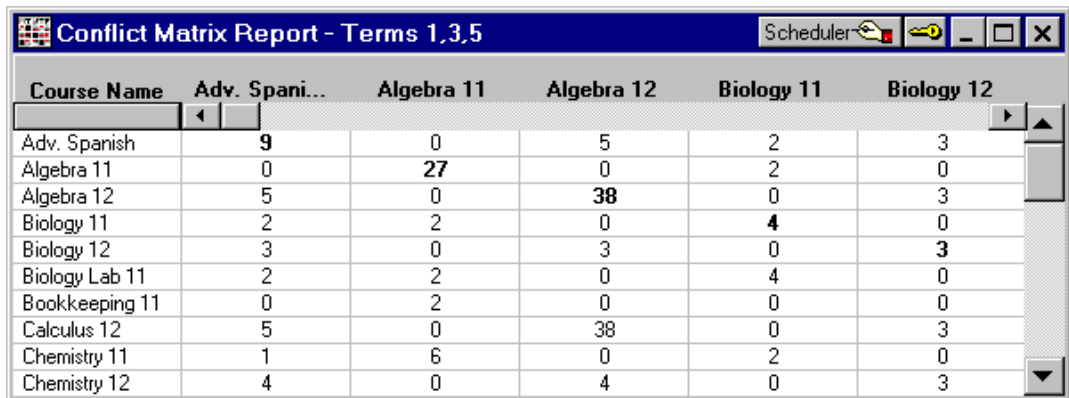
Generate this report before manually scheduling any class regardless of whether you are manually scheduling your school or using Create Timetable.

Conflict Matrix is particularly useful to pinpoint conflicts with limited teacher, room, and class resources. Create Timetable calculates conflicts for each course according to the number of sections, number of terms, number of blocks needed and available, and room and teacher availability.

When working in the School Timetable window click Difficulties in the Class Display Mode section to build the Conflict Matrix.

If you add or delete requests while the Conflict Matrix is open, a white vertical bar appears in the title bar. Close and reopen the Conflict Matrix, to update.

The Conflict Matrix lists courses on each axis. Each cell reports the number of students with first-choice requests for both courses. The number of requests for a course is in bold.



The screenshot shows a window titled "Conflict Matrix Report - Terms 1,3,5" with a "Scheduler" toolbar. The table below is a reproduction of the data shown in the window.

Course Name	Adv. Spani...	Algebra 11	Algebra 12	Biology 11	Biology 12
Adv. Spanish	<b>9</b>	0	5	2	3
Algebra 11	0	<b>27</b>	0	2	0
Algebra 12	5	0	<b>38</b>	0	3
Biology 11	2	2	0	<b>4</b>	0
Biology 12	3	0	3	0	<b>3</b>
Biology Lab 11	2	2	0	4	0
Bookkeeping 11	0	2	0	0	0
Calculus 12	5	0	38	0	3
Chemistry 11	1	6	0	2	0
Chemistry 12	4	0	4	0	3

Double-click a cell to create a Student Subset with the names of all students requesting both courses.

You can print this report in 2 formats:

- Matrix format, as it is displayed on the screen.
- List format, which prints to paper more quickly than the matrix, and may be more useful to view. Deselect matrix format to print in list format.

The list format displays the course number immediately to the left of the course name. The number of requests is to the left of the course number.

Resource Check Report			
Chancery Academy			
Course	Pref	Loadings	Room (capacity)
Algebra 11 [2]			
Arness, James	9	4,4,0,0,0	105 - Classroom ( 35 )
Mann, Peter	0	0,0,0,0,0	106 - Classroom ( 35 )
			109 - Classroom ( 35 )
			Any Classroom
All blocks useable. Same period for 5 day(s), 2 term(s). Section Capacity (Min, Max): 24, 28			
Algebra 12 [2]			
Arness, James	9	0,0,0,0,0	Any Classroom
Mann, Peter	9	2,2,0,0,0	109 - Classroom ( 35 )
			Any Classroom
All blocks useable. Same period for 5 day(s), 2 term(s). Section Capacity (Min, Max): 25, 30			
Biology 11 [1]			
Cavein, Tich	9	1,1,0,0,0	Any Science Lab
			Any Science Lab
			Any Classroom
O'Reilly, Janet	0	2,2,0,0,0	Any Classroom
			Any Gymnasium

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#### To print the conflict matrix:

- From the Windows menu, choose Conflict Matrix.  
Double-click any cell in the conflict matrix to see a list of the students requesting those 2 courses as a Student Subset.
- In the Conflict Matrix window, choose Print from the System menu.
- Deselect "Print matrix format" to display the "Single-Section Courses" option. Single Section Courses prints in list format.  
While single-section classes require less memory, they are most affected by conflicts. For example, students who request 2 single-section classes will get only 1 of the classes if the 2 are scheduled for the same time.
- Click OK.

## Course Loading

### Reports/Algorithm/Course Loading

The Course Loading report describes teacher loading for selected courses. Beside each teacher name are preference for the course, number of sections and blocks loaded, and number of sections and blocks scheduled.

Use this report after loading teachers and after building a timetable to compare teacher scheduling versus loading.

You cannot print this report while Create Timetable from the Schedule menu is running.

---

## Course Request Tally

Reports/Algorithm/Course Request Tally

The Course Request Tally shows the total number of requests, sub-totaled by gender and grade level, for selected courses. The number of sections is in brackets.

Use this report to check request distribution among courses and grade levels, and to discover gender discrepancies.

If your school has more than 9 grade levels, print this report in landscape orientation to fit all the information across 1 page. If your school has more than 15 grade levels, change the level of reduction for this report.

---

## Equivalent Full Time

Reports/Special/Equivalent Full Time

Equivalent Full Time (EFT) means the percentage of a full-time teacher's schedule that a course requires. Set up the EFT for each course in Details. Some schools also use the term Full-Time Equivalent or FTE.

This report lists all courses by department. For each course, it lists the number of sections, the EFT per section and the EFT required to teach all sections. For each department, it lists the total EFT required, and at the end of the report, the total number of classes and the total EFT required.

Use this report to evaluate the number of classes created in terms of teacher resources.

Print options, Page break between lists, and Print Terms affect this report.

---

## Ethnic Mix

Reports/Special/Ethnic Mix

The Ethnic Mix report produces gender and ethnic category statistics for selected students.

Select all the students in a class roster, program, or grade to generate statistics for those groups.

---

## Free Rooms

Reports menu/Lists/Free Rooms

For selected rooms, the Free Rooms report lists for each block during selected print terms, all rooms that are free. Blocks in which no rooms are free are not shown.

Use this report to help you find empty rooms when building the master timetable.

---

## Free Students

Reports/Lists/Free Students

For selected students, the Free Students report lists, in each block during the selected print terms, all students who are free. Blocks in which no students are free are not printed.

Use this report to help you finish filling student timetables.

---

## Period Schedule

Reports/Special/Period Schedule

For selected classes, the Period Schedule report lists all the periods in your schedule and shows the selected classes in the periods in which they are taught. This is a list version of the Class Timetable report matrix.

After creating the school timetable, use this report to view some or all of your classes in a school timetable.

---

## Resource Check

Reports/Algorithm/Resource Check

For selected courses, the Resource Check report lists the teachers loaded.

For each course, it lists the number of classes, room preferences, available blocks, number of days and terms, and maximum and minimum class sizes.

For each teacher, it lists the teacher's level of preference for the course, the number of sections loaded for each term, and room preferences.



---

## Special Courses

Reports/Algorithm/Special Courses

The Special Courses report lists courses with special requirements, and all courses scheduled in the Special Courses phase of Create Timetable:

- Linked Groups courses
- Following Triplets courses with their group numbers.
- Courses with all sections in same period selected in Course Details.
- Courses with student Clusters selected in Course Details.
- Courses chained together by the Preceding Course setting in Course Details, Scheduler tab.
- Block-restricted courses. Courses that cannot be taught in all blocks.
- Courses with extra periods.
- Combined classes, which are classes scheduled for the same time, teacher and room. An asterisk (\*) indicates the representative class.

If you are having difficulty in the Special Courses phase of Create Timetable, print this report to get a listing of the groups it is scheduling.

---

## Student Clusters

Reports/Lists/Student Clusters

For each program-grade, this report lists the students in each cluster and their classes. Off Team appears in the row for any class not in that cluster.

Use this report to identify clusters and the students assigned to them.

---

## Student Locations

Reports/Special/Student Locations

For selected students, the Student Locations report prints their scheduled room number for each block of the school timetable.

Print this report when student timetables are complete to see where a student is in any period.

---

## Student Requests

### Reports/Algorithm/Student Requests

For selected students, the Student Requests report lists requests, whether they are required R, or elective E, courses, and whether the student meets all prerequisite, co-requisite, and gender requirements.

For each course, if the student meets a prerequisite or co-requisite requirement, that column is blank. Otherwise the relevant course name is displayed. N is displayed in the Gender column if the student does not meet the gender requirement for a course.

Use this report to check that requests are entered correctly, or to find requests where prerequisite, co-requisite, or gender requirements are incorrect.

---

## Teacher Clusters

### Reports/Algorithm/Teacher Clusters

The Teacher Clusters report lists the clusters for each program, the courses taught in those clusters, and the teachers assigned to those courses, with the number of sections in brackets. The numbers beside the teacher names are the section numbers of each course to which each teacher is assigned in the Clusters & Teams dialog.

Print this report if you have assigned teachers to classes in the Clusters & Teams dialog from the Schedule menu.

This report describes the contents of the Clusters & Teams dialog, not what is scheduled. If you manually schedule classes without referring to the Clusters & Teams dialog, then this report will not reflect the schedule.

---

## Teacher Loading

### Reports/Algorithm/Teacher Loading

For each selected teacher, this report lists the maximum block load and all the courses that the teacher has a preference for, is loaded for, or is scheduled into.

For each course, this report lists the number of blocks required to teach a section, the teacher's preference, the number of terms the teacher is loaded for, the number of blocks the teacher is loaded for, the number of sections the teacher is scheduled into, and the number of blocks the teacher is scheduled into.

Use this report when loading your teachers to check which courses a teacher is loaded for and when creating your school timetable.

You cannot print this report while Create Timetable is running.

---

## Teacher Rosters

Reports/Lists/Teacher Rosters

For each selected teacher, the Teacher Rosters report shows teacher, room, number of students, and a class roster for each class the teacher teaches. The class roster shows all students in the roster for selected terms. Any student enrolled in the class only during terms not selected will not appear.

Use this report to give teachers their class rosters and the schedules of the classes they teach. This report is the same as the Class Rosters report, except it prints according to teacher.

---

## Timetables

### Course Timetable

Reports/Timetable/Course

After creating the school timetable, use the Course Timetable report to view some or all of your classes in a school timetable.

Print by Period displays periods down the page, and days across the page.

Print by Course displays courses, by the day, down the page, and periods, by the day, across the page.

### Room Timetable

Reports/Timetable/Room

For selected rooms, the Room Timetable report lists all the classes, teachers, and total number of students enrolled in each term by room. The report can be printed in list format, by block, or in matrix format by period and day.

Print this report during or after creating your school timetable.

### Student Timetable

Reports Menu/Timetable/Student

For selected students, the Student Timetable report prints the classes, teachers, and rooms that they are scheduled into in either list or matrix format.

If classes are in list format and Print Periods is not selected in the Print Options dialog, classes appear by block. Otherwise they appear by day and period. Use Print Options to include homeroom, locker number, homeroom teacher, counselor, and address in the report.

Use this report after completing student timetables to give each student a timetable.

## Teacher Timetable

Reports/Timetable/Teacher

For selected teachers, the Teacher Timetable report lists scheduled classes, rooms, and total number of students enrolled in each term by teacher. The report can be printed in list format by block or period, and in matrix format by period and day.

Print this report during or after creating your school timetable.

---

## Today's Add/Drop

Reports/Lists/Today's Add/Drop

For each teacher whose rosters have changed, the Today's Add/Drop report prints:

- The names of classes with changed rosters.
- The name, grade, and student number of students who transferred in or out of a class on a selected transfer day.

You can print this report daily and distribute it to teachers to advise them of changes to their class rosters.

---

## Transfers

Reports/Lists/Transfers

The Student Transfers report lists Historical timetables for selected students and classes.

Scheduler records students scheduled in every block of the year, and assumes that information is true from the beginning of the school year to the end. If a schedule changes, the effective dates of the old schedule become from the beginning of the year to the currently selected transfer date, and the new, changed schedule is dated from the following day to the end of the year.

Every day a student timetable changes, the effective date on the last timetable is changed and a new timetable is added. If you run Scheduler to

reschedule 1 student, that student ends up with several Historical timetables.

Classes have Historical rosters which record the students in a class during a date range, and every time a student transfers in or out of a class, a new Historical roster is created.

Student Historical timetables display the date range for the timetable, then list each block and term and its scheduled class. Free blocks are not listed.

Class Historical rosters show the date range for the roster and list the names of students in the class. The final column indicates the terms in which the student is enrolled in the class. "P" indicates that the student is enrolled in that term. "A" indicates that the student is not enrolled in that term.

The long format lists Historical timetables for selected students and/or Historical rosters for selected classes.

Select "Brief Transfer Report format" to show the dates each selected student added or dropped classes.

Run this report to verify a student timetable or class roster for a particular date.

---

## Wait Lists

### Reports/Lists/Wait Lists

For each selected course, the Wait Lists report lists all the students remaining on the wait list, the total number of requests for the course, and the percent of requests filled.

As you enter course requests, you can see which students are requesting a course. As you create student timetables, you can see which students have not yet been scheduled into requested courses.

# Troubleshooting

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## Solving Problems in Scheduler

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Make sure no one is using Win School before you make changes in Scheduler Master mode.

### If your schedule does not appear to be complete

You need to optimize your timetable.

#### To optimize your timetable:

- 1 From the Schedule menu, choose Create Timetable.
- 2 Set options and click Optimize.
- 3 Adjust your schedule and settings and repeat this process until Win School reports that everything is in its optimal position.

### If a student is not scheduled for required courses

It is likely the student's electives are listed before his or her required classes in requests. To correct the problem, you will have to re-assign the student's required courses ahead of his or her electives.

#### To re-assign the compulsory courses:

- 1 Select the required courses.
- 2 From the Schedule menu, choose Assign Students.
- 3 Select the "Use selected courses only" option, as well as any other options used by your school. Click OK.
- 4 Select the other courses. In this case, select the electives.
- 5 From the Schedule menu, choose Assign Students again, and repeat step 3.

### If students are not fully scheduled

Check if the student has the label Can Take in the Student Requests window. If so, you need to reassign the student. This problem occurs when Assign Students is not given enough time to schedule the last few requests in the student request lists.

Scheduler does not automatically remove a student after the student has been placed.

**To fully schedule students:**

- 1 From the Schedule menu, choose Assign Students.
- 2 Select the Use Backtracking option.
- 3 Increase the amount of time you allow per student in the Maximum time per student field.

The greater the time you set, the longer it takes Scheduler to schedule the students.

- 4 Click OK.

**If there are inconsistencies in teacher/room/students timetables**

You should validate your timetable. From the Schedule menu, choose Validate. This command analyzes the Scheduler information and correct any problems it encounters.

**Check Details = impossible/conflicting combination of clocks/days/periods/extra periods**

This message appears if Scheduler cannot schedule a class because there is inconsistent course information in Details.

- 1 Start Details.
- 2 In the Courses view, double-click the course that wasn't scheduled.
- 3 Check in the Scheduler tab:
  - If the course is part of a combined class, Linked Group, or Following Triplet, all the other courses in that group must have the same Scheduling Term Information settings, and the Use in Scheduler field is set to Yes.
  - If the course is part of a combined class, the Teacher Required, Room Required, and Student Clusters fields must be identical for all courses in the combined class.
- 4 In the Periods tab, check that the number of periods per day is no greater than the number of periods in a day set in the Timetable Structure dialog in the Scheduler menu in School Setup.

---

**Points of Interest**

Question	Answer
How many Terms can be scheduled?	12. The fewer you need the less disk space and memory used.
How many Periods can be scheduled?	42.

Question	Answer
How many Blocks can be scheduled	<p>Blocks x Terms = maximum 1200.</p> <p>Maximum blocks per term: 304.</p> <p>The fewer you need, the less disk space and memory used.</p>
Why can't I create a Timetable?	<p>You might have reached the Time Record maximum of 32,767. When you click the Scheduler Information icon in the title bar of the Scheduler Main window, the "Meeting times of all classes" is your Time Record, and it cannot be more than 32,767.</p> <p>Blocks x Terms = maximum 1200.</p> <p>Maximum blocks per term: 304.</p>
Can you change the number of terms after School Timetable is created?	Yes, but you will have to reschedule your classes and students in Scheduler.
Why don't student timetables print all of the periods?	<p>Periods defined in School Setup as 0 minutes in length will not print on student timetable reports in either List or Matrix modes. For example: 00:00 - 00:00 or 12:45 - 12:45.</p>
Can I exclude periods from printing on the teacher timetable report?	<p>Periods defined in School Setup as 0 minutes in length will not print on teacher timetable reports when run in Matrix mode. For example: 00:00 - 00:00 or 12:45 - 12:45.</p>
In the Sections window, does the teacher need to be loaded for all members of a combination class?	No, load a teacher for the representative class.
Why are the green triangles disregarded when manually scheduling a class on the School Timetable?	<p>The green triangles are visual aids only when manually scheduling a class. It is only when Scheduler is building the School Timetable that it looks at the period/block constraints defined in Details. If you need to schedule a class using different time periods, select Block or Period in the Enter by section.</p>
Can I limit the number of students a teacher can teach?	<p>No, but you can see the number of students a teacher is scheduled to teach in the Teacher Main window. Select Teaches from the VCR buttons. This information is also available in the School and Student Timetable windows.</p>
How do I limit the size of my combination class to 30 students?	<p>Enter the maximum number of students for individual sections of a class in the Sections Main window. If a combination class has 2 member classes, set each class so the maximum class size is not exceeded.</p>

Question	Answer
When I copy and paste 1 student's timetable to another, the results don't always match. Why?	<p>Scheduler will try to fully schedule the target student into each of the original student's classes. If the student you are copying has an incompletely scheduled class, the 2 schedules will not match. Scheduler does not schedule by block, but tries to fully schedule the class. For example, if the original student is scheduled into 2 classes out of a possible 5 classes a week, when you paste the timetable, Scheduler will try to schedule the student into all 5 classes.</p> <p>Preferences also affect pasting, depending on which option you choose in the When Pasting Classes section in Scheduler Preferences.</p>
When I select Enter by Block in the School Timetable window, why can't I see the same block letters I used in Timetable Structure under School Setup?	School and Student Timetable windows use Block Labels that are defined in Block Labels in the Scheduler menu in School Setup. If you need this information to appear in Scheduler, include a Short Label at the start of the Block Label. For example: A Period 1.
I use multi-paste to give my students core course requests. When I manually add electives, why are the elective requests at the top of the request list?	The highlighted item in the Requests column of the Student Request window determines where the manually added requests will be placed.
On the Check Requests report, why does the Course Name appear as '...' instead of the actual course name?	There is no grade level set in Details for that course. Courses with a grade level set to N/A in Details will print '...'.
Why aren't my courses showing in the Clusters & Teams dialog?	<p>For courses to display in the Clusters &amp; Teams dialog, 3 elements have to be set in Course Details:</p> <ul style="list-style-type: none"> <li>• General tab: course has a grade level.</li> <li>• Scheduler tab: set Student Clusters to Yes.</li> <li>• Lists/Required tab: course set for a Normal Program.</li> </ul>
Some of my Scheduler reports truncate long course numbers. What can I do to see the whole course number?	In Preferences from the Edit menu, change Course Name Format to Number Name Grade.

# Glossary

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## Block

Scheduler schedules according to blocks, not periods.

Block is the smallest unit of time, representing classes, teachers, rooms, and students taught at the same time. Blocks are identified by letters.

Blocks can be repeated throughout your timetable which means the same students and teachers will be in the same rooms for the same classes at different times. If even 1 element changes, it is considered a unique block, which is important in calculating how many blocks your school needs.

If you move a block letter from one time to another, you change the time that all the classes scheduled in that block are taught.

If you duplicate a block letter, adding it to a new period in the timetable, all the classes scheduled in that block are now also taught in the new time.

## Class

In general, a class is the smallest unit a course can be divided into. A course can consist of only 1 class, or many classes. For example, 90 Grade 11 students are requesting Biology Lab 11, and each lab room can hold up to a maximum of 30 students. So 3 classes were created to accommodate the demand: Biology Lab (1), Biology Lab (2), and Biology Lab (3).

Class is also used in the term Class Rank, which indicates the standing within a grade level that students are assigned based on their marks.

## Class Roster

A roster consists of the students and teacher assigned to a class, or section, of a course.

## Course

A course is an instructional subject taught in a school, divided into classes (sections). For example, 200 Grade 11 students requested English 11 and Spanish 11 this year.

## Cycle

The single completion of a schedule, such as a day or a week. Cycles repeat and are affected by holidays.

Cycle is the largest unit of time, measured in days.

**Day**

Day is a series of blocks, 1 block per period. A block taught in 1 day may be unique to that day, or it may also be taught on other days.

**Following Triplet**

Courses taught in consecutive periods, where the teacher and room may change. For example, Biology and Biology Lab, or Math 11a, 11b, 11c where algebra, geometry, and trigonometry may be taught by different teachers.

**Fragmented Course Request**

Where students request part of a course in one year and other parts of the course in another year. For example, taking term 1 of Algebra 10 this year and term 2 next year. Also called Term-based course request.

**Grade**

In general, a grade is the instructional level that a student is currently in, or that a course is given in. For example, 200 Grade 11 students enrolled in Grade 11 English this year.

A grade is also used to indicate a mark that a student has received for a class. For example, in a Grade Distribution report.

**Linked Group**

Courses taught in the same period on the same day, or in the same period on different days, or in the same period in different terms. The teacher and room may change.

**Period**

Standard amount of time in which blocks and classes are scheduled.

**Roster**

A roster includes the students and teacher assigned to a class, or section of a course.

**Section**

In general, a section is the same as a class.

Section is also used in the term Section Rank, which indicates the standing within a class that students are assigned based on their marks.

**Term-based Course Request**

See “Fragmented Course Request.”

**Terms Offered**

The terms in which a class can be taught. This is set in the Set Sections dialog.

**Terms Requested**

A student's requested terms.

**Terms Taught**

The way a class is scheduled.

**Time record**

Unit of time within a schedule to a maximum of 32,767 Time Records.

To see your Time Record, click the Scheduler Information icon in the title bar of the Scheduler Main window. The "Meeting times of all classes" is your Time Record.

**Timetable**

The term used by Win School for a student, teacher, and school schedule. Also referred to as a schedule.



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