This four-hour training provides the basic mass scheduling steps and practices and an overview of procedures, forms, and reports used in master scheduling practices for preparation of the next school year. The following features are included: Scheduling Setup, Scheduling Master Schedule Board, Master Schedule Board, course requests, managing sections, and scheduling students. In depth Complex Scheduling features and/or Master Schedule Theory are available with additional Aeries training.

**A – Basic Mass Scheduling Steps**

* Collect and enter Course requests
* Print Reports (Tally, Conflict Matrix)
* Build & enter Scheduling Master Schedule (SMS)
* Print Scheduling Master Schedule Reports
* Schedule students
* Print scheduling analysis reports
* Repeat as needed

**B – Aeries Scheduling Tables (Scheduling Process Dashboard C1, C2, F1, F2)**

**Scheduling Process Dashboard**

* + Order of Scheduling Process includes hyperlinks to Pages and Reports
* SMS – Scheduling Master/SMS Board (C1, C2)
	+ Sandbox environment used to build the MST for the next school year
	+ Mass schedules students into sections based on course requests
	+ Students can be mass assigned to sections
* MST – Master Schedule/MST Board (F1, F2)
	+ Active schedule used during school year
	+ Students can be mass assigned to sections

**C – School Options and Course Setup (A2, A5)**

**Node: School Info | School Options**

* Scheduling Type – Secondary
* Attendance Type – Period
* Attendance Reporting – Negative
* Schedule Basis – Semester (Typically)
* Term Dates – Define Grading Periods

**School Info | Portal Options | Scheduling Tab (A5)**Portal Options – For Student/Parent Portal Course Request Entry

* Define Date Range for each grade level
* Allow Alternate Requests – add max number
* Hide Scheduling Results
* Hide Currently Scheduled Classes for Future Terms

**Node: Scheduling Process | Courses (A2)**

Build Courses and update fields for state reporting requirements.

* **General Tab**
* Honors Courses (CRS.NA)
* College Prep (CRS.CP)
* Course Low/High Grade (CRS.LO/CRS.HI)
* Default/Max Credit (CRS.CR/CRS.MC)
* Subject Area Code (CRS.S1/CRS.S2/CRS/S3)
* Term (CRS.TM)
* **Other Tab**
* College Credit Only – Crs Lvl = 23 (CRS.CL)
* Dual Credit – Crs Lvl = 24 (CRS.CL)
* Algebra 1 Requirement – check if applicable (CRS.ALR) checkbox
* Algebra 1 Crd Required – enter credit amount is applicable (CRS.ALC)
* **California Specific Tab**
* CSU Entrance (CRS.E1, CRS.CSE, CSU.CSH)
* UC Entrance (CRS.U1, CRS.U2, CRS.U3)
* Validations (CSU.VL, CRS.VLU)
* State Course Code (CRS.C3)
* Crs Content Subcategory – if applicable (CRS.CSC)
* Std Grade Range (CRS.SGR)
* Content Standards Alignment (CRS.CSA)
* AP/IB Crs Code Cross Ref (CRS.ACC)
* Middle School Core (CRS.MSC) if applicable
* Charter Non-Core (CRS.CNC)
* **Correspondence Language Tab**
* Up to six languages can be translated for report card

**D – Scheduling Setup Page (A1)**

**Node: Scheduling Process | Configurations | Scheduling Setup**

* Creates the SMS table for scheduling
	+ SMS represents the planned MST for next school year
	+ Use the **Scheduling Setup** page to copy over MST to SMS or activate the SMS table
	+ The page is divided into four areas
		- Scheduling Status
		- Data Entry
		- Scheduling Options
		- SMS & SSS Initialization
	+ Schedule students into classes for next school year or for future term

**E – Entering Course Requests (A3, A4, B)**

**Node: Scheduling Process | Configurations | Course Request Packets (A3)**

* Course Request Packets
* Packets are school-specific
* Packets are used for course request templates in student scheduling
* Packets roll over from year to year

**Node: Scheduling Process | Configurations | Update Course Request Options (A4)**

* Course Request Options page is used to update available course options for student/parent selection in the Portal
* Course Options are defined by grade level

**Collecting Student Course Requests – Four Methods (B)**

* Student/Parent request entry via Aeries Student Portal
	+ Based on dates set in Portal Options
* **Import Course Requests from Academic Plan**
* **Mass Change or Add Course Requests**
	+ Multiple courses can be added, dropped, or changed for all students or select students
* Manual entry on **Student Course Request** Page
	+ Used to schedule individual students into classes for upcoming semester or school year after courses are entered

**F – Course Request Reports**

* **Scheduling Course Request Tally**
	+ Simple tally of student requests by grade
* **Scheduling Conflict Matrix**
	+ List/Chart – potential conflicts, specifically for singletons and doubletons
* **Scheduling Reverse Verification Listing**
	+ List of students requesting specific courses

**G – Scheduling Master Schedule – SMS**

**(C1, C2, D1)**

**Complex Scheduling features are available in Aeries and offered with additional training.**

**Node: Scheduling Process | Scheduling Master (C2)**

* Using Scheduling Master (C1) – Updates sections and/or moves sections with students
* Key fields on section to populate:
	+ Period
	+ Block
	+ Term
	+ Course
	+ Teacher
	+ Max
	+ Exclude
* Options for section changes:
	+ [Add, Change, Delete, or Copy Sections](https://support.aeries.com/support/solutions/articles/14000087941-add-change-copy-or-delete-a-section-in-the-master-schedule)
	+ [Move or Copy students](https://support.aeries.com/support/solutions/articles/14000087943-move-copy-or-drop-students-from-a-section-in-the-master-schedule)
* Using [Scheduling Master Schedule Board](https://support.aeries.com/support/solutions/articles/14000069891-scheduling-master-schedule-board) (C2) – Updates sections only
	+ Schedules all students by Course Requests
	+ Drag/Drop functionality
	+ Add, Move, Copy, Edit or Drop a Class
* **Scheduling Mass Change Sections (D1)**
	+ Mass assign by Grade Level
	+ Mass assign by KEEP/SKIP Query
	+ Mass assign by Student Group
	+ Mass assign by Spreadsheet of Student IDs

**H – Schedule All Students (D2)**

**Node: Scheduling Process | Schedule All Students**

* Scheduling Options
* Mass Update Student Schedules
* Honors KEEP/SKIP Query
* Run Scheduler
* Lock/Unlock Mass Scheduling

**I – Scheduling Analysis Reports**

* **Scheduling Course Request Analysis**
* **Scheduling Class Load Analysis**
* **Scheduling Class Load Averages**
* **Scheduling Reject Analysis**

**J – Copying SMS to MST Process (E1)**

**Node: Scheduling | Functions**

* Backup and Restore Scheduling Results
	+ Backup! Backup! Backup!
* **Copy Scheduling Results to MST & SEC**

**K – Student Assignment Adds/Changes (F1, F5)**

**Node: Scheduling Process| Master Schedule**

**Some section changes are NOT ALLOWED after attendance initialized.**

* Assignment changes:
	+ Updated on the Master Schedule
* Staff changes:
	+ Updated on the **Teacher** page
* Student changes - four options:
	+ Teacher record – Assign/Move sections to another teacher
	+ **Mass Change Section Numbers** **(F5)** – moves groups of students to another section (moves the entire class unless using a KEEP/SKIP Query statement)
	+ Section – Assign/Move the selected students to a new section
	+ Classes page – change schedules individually

**L – Master Schedule Reports**

**Node: Reports | Scheduling**

* **Master Schedule**
	+ Comprehensive Information on Sections
* **Class List by Section**
* **Class Rosters**
	+ Used for Attendance (Grid)
	+ Sub Folders
* **Student Locator Cards**