**A – Basic Mass Scheduling Steps**

* Collect and enter course requests
* Print reports (tally, conflict matrix, reverse verification listing)
* Build and enter scheduling master schedule
* Print scheduling master schedule reports
* Schedule students
* Print scheduling analysis reports
* Repeat as needed

**B – Aeries Scheduling Tables**

* SEC/MST – current schedule, impacting attendance (ATT), course attendance (CAR), grades (GRD), etc.
  + SEC table contains student numbers and section numbers
  + MST defines section numbers in SEC using CRS and STF
  + Tables work in conjunction
  + MST – you cannot make changes to MST (impacts ATT and GRD) – you can add new sections as needed, but cannot change existing sections
* SSS/SMS
  + SSS – holds student requests/section #s
  + SMS defines section numbers in SSS using CRS and STF tables – this is your sandbox, can be changed as much as needed
  + MST and SMS are identical (same fields, pull from CRS) – MST is LIVE, SMS is SANDBOX

Diagram

Description automatically generated

**C – Forms Affecting Scheduling**

* School Options (LOC table)
  + Grade Range
  + School Type
  + Schedule Basis – trimester vs. semester
* Staff Data (STF table)
  + The STF table is district owned
  + Verify Staff record
  + View MST/SMS sections
  + Placeholder Staff – no SEID – no state reporting
* Course Data (CRS table)
  + Note that Course table is district owned – field data should not be changed unless accurate for all schools using courses
  + Course (CRS) fields impacting scheduling
    - Grade Range
    - Default Credit
    - Status Tag
    - Next Year Status Tag
    - Subject Area/Department
    - T/A Checkbox
    - Fields that will show in Student Portal
      * College Prep
      * Course Description
      * CSU and UC areas
  + Other Tab - Alternate Crs – informational only
  + Prerequisite – applies in certain circumstances

**D – Scheduling Dashboard**

**Node: Scheduling Process | Scheduling Process Dashboard**

* A. Setup/Config
* B. Course Requests
* C. Build Scheduling Master Schedule
* D. Schedule Students
* E. Finalize
* F. Active Master Schedule

**E – Student Scheduling Setup**

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

* Requires “Administer” level permission to SSS/SMS table to initialize
* Setup options
  + Status
  + Scheduling Options
  + SSS and SMS Initialization
    - Course Requests
    - Scheduling Master Schedule

**F – Backup/Restore Function**

**Node: Scheduling Process | Functions | Backup and Restore Scheduling Results**

* Backup frequently
  + At each milestone (i.e., all course requests entered, singletons placed, doubles placed, each section move)
* Restore ***CAREFULLY*** from previous versions

**G – Course Request Packets**

**Node: Scheduling Process | Configurations | Course Request Packets**

* Build new packet
* CRD/CRP permission required
* Update existing packets
* Packets are school-specific
* Packets copied year to year

**H – Entering Course Requests**

**Parent/Student Portal**

* Allows parents/students to enter course requests
  + Parents/students need permission to SSS
* Update course request options (CRQ)
  + Create/Recreate Course Options
    - Pulls all ACTIVE courses from CRS table
    - Grade range is applicable
  + Modify by grade level
  + “Allow” checkbox for individual courses
  + Tag/Untag all
  + Update totals from MST – shows current enrollment numbers
  + Tag/Untag based on totals
  + Add a Course – if new course was added to CRS after table created, this can be used to pull single course in
  + Hide un-Tagged Courses
* Portal Options – Scheduling
  + For Parent/Student Portal course request entry
  + Allow Alternate Request
    - Max Number Primary/Alternate
  + Define date range for each grade level
  + Hide Scheduling Results
  + Hide Currently Scheduled Classes for Future Terms

**Import Course Requests from Academic Plan**

* Select Term
* Select School
* Select Grade Levels
  + Allows Query KEEP/SKIP
  + Additional Options
  + Preview/Update

**Mass Change or Add Course Requests**

* Discuss use of form to mass change, mass add, or mass delete
* Change students with these course requests
  + Leave blank to ADD courses only
* To now have these course requests
  + Leave blank to DROP courses only
* Course Request Packets Button
* Grade/Gender restrictions
* Allows Query KEEP/SKIP
* Preview/Update
* Print List

**Individual Student**

* Add One/Add Many New Record(s)
* Edit/Delete Records
* Staff Preference
* Add From Course Request Table
  + Brings up portal view
  + Only pulls allowed CRQ records
  + Can add/edit requests/alternates
* Course Request Packet
* Alternate Course Requests
  + Enter alternate requests
  + Sort by priority order
  + Use “Manage” to link alternate to primary request
* Scheduling Exclusions
* Meets – pulls from Class Calendar

**I – Course Request Reports**

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

**J – Flex Periods**

**Node: Attendance Accounting | Configurations | Flex Periods**

* Assign each Academic Year
* Permission to FTF, FTT, and BSD
* Short Title – 6 characters
* Tiny Title – 2 characters
* Description – long version
* Start/End Times
* Type
  + Blank – Standard Flex Periods
  + “C” Non Conflict Flex Period
    - Scheduler will not check for date/time conflicts
    - Allows student to be scheduled into section that meets at same time as another class
* Assigned to sections

**K – Class Calendars**

**Node: Attendance Accounting | Configurations | Class Calendars**

* Assign each Academic Year
* Add New Calendar – Save – Mass Select Dates
* Short Title – 6 characters
* Description – long version
* Mass Select Dates appear when adding new Class Calendar
* When logged into current school year and DAY table created, Mass Select Dates will skip any non-school days
* Admin users can COPY (within same school)
* Admin users can PUSH (to other schools)
* Recommended to have 1:1 relationship between Flex Periods and Class Calendars
* Assigned to sections

**L – Build & Enter Master Schedule (SMS)**

**Node: Scheduling Process | Scheduling Master**

* Primary SMS Section Fields
  + Section number assigned by Aeries
  + Semester
  + Flex Period
  + Class Calendar
  + Course ID
  + Tag
  + Sch Exc – no students will be added to this class with mass schedule, students can be added manuall
  + Exclude – excludes from grades, attendance, or both
  + Max number of students
* Fields defaulted from Course (CRS)
  + Credit
  + Grade Range
* Section Staff Members
  + Pulls from STF
  + Primary Teacher
  + Staff Role
  + Permissions
  + Status
  + Multiple staff members can be assigned to section
* Sections with missing Flex Period or Class Calendar will not be scheduled

**M – Scheduling Master Schedule (SMS) Board**

**Node: Scheduling Process | Flex SMS Board**

* Overview tour of SMS Board
* CAUTION: Only one person should be making changes at a time
* Display Options
* Add, Change, Move, Copy, Delete
* Schedule Students
* SMS Builder

**N – Scheduling Master Schedule Reports**

* Before students scheduled, validate data entry
* Prescheduling Edit Listing – potential conflicts (no sections assigned, invalid course, grade range, too many requests to be scheduled, no course requests)
* Scheduling Course Request Analysis – tally with section count, section average, and seats short info added
* Print Scheduling Master Schedule – by Course, Teacher, Room, etc

**O – Schedule All Students**

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

* Options for scheduling runs
* Schedule All Students
  + Grade Level Order
  + Alpha Order
  + Additional Options
* Review results summary

**P – Scheduling Master Schedule (SMS) – After Scheduling Students**

* Copy sections
  + Perm Lock students will not be moved
  + Options to Move/Copy/Do Not Move or Copy students
* Move/Copy students to another class
  + Tagged Students
  + All Students
  + Use Section #0 to Drop all students from the class – Move Students
* Delete Section
  + Keep/drop course request

**Q – Scheduling Analysis Reports**

* Scheduling Course Request Analysis
  + Identifies how many seats short and how many rejects for each course
* Scheduling Class Load Analysis
  + Detailed statistics for all sections
* Scheduling Class Load Averages (Seat Count Report)
  + “Display only Totals” option recommended – seat counts per grade/period

**R – Course Requests/Schedule**

**Node: Scheduling Process | Course Requests/Schedule**

* Use Previous/Next Rejected Student
* Types of Rejects
  + All Full
  + Conflict
  + Grade Range
  + Teacher Preference/Exclusion conflict
  + Stu Group
  + Track
  + Sex Restriction
  + Alternate – alternate was scheduled
* Locking Sections
  + Temp lock – one/individual sections
  + Temp lock – All sections
  + PermLock Sections – Lock stays in place after roll to MST
* Reschedule button – reschedule individual student, skips any locked sections
* View SMS – display SMS sections/details
  + Sort or Limit features
  + Add section or course from View SMS

**S – Grouping Features**

* Semester Group (single character)
  + Ensure that one course from group will be in Fall and one course in Spring (i.e., Govt/Econ)
* Scheduling Group (max 2 characters)
  + Example – Houses or Academies
  + Students are assigned to a scheduling group, and sections are also assigned to a scheduling group
* Team Course Group (max 2 characters) & Team Number (0 - 9999)
  + Example – Core Team Teaching
  + Assign the same Team/Course group code to all sections of all courses that are to be divided into teams/groups
  + Scheduler splits the kids up into groups without having to mark each student into a specific group

**T – Final Steps**

* Print Student Locator Cards – choose SMS
  + Review additional options
* Print Class Rosters – choose SMS
  + Review additional options
* Copy Scheduling Results to SEC & MST
  + Requires “Administer” level permission to SEC/MST table to copy
  + Term dates defined in School Options before copying scheduling results
  + Copy to SEC/MST function will:
    - Copy SSS to SEC – will overwrite if SEC already has classes
    - Copy SMS to MST – will overwrite if MST already exists
    - Copy SSM to SSE – will overwrite if SSE already exists

Diagram

Description automatically generated

**Query Samples**

**SSS:  List of Teachers with Section Information on Teams/Groups and Grade Levels**

LIST SMS SSM STF STF.FN STF.LN SMS.SE SMS.FSQ SMS.SG SMS.CG SMS.TM SMS.LO SMS.HI BY STF.FN STF.LN IF SSM.PR = 1

**SSS:  List of Sections with Scheduling Team/Group Designation**

LIST SMS SSM STF STF.FN STF.LN SMS.SE SMS.CN SMS.FSQ SMS.SG SMS.CG SMS.TM BY STF.FN STF.LN SMS.SE IF SSM.PR = 1

**SSS:  List of Students with a Preferred Teacher Not Scheduled with Preferred Teacher**

LIST STU SSS SMS SSM STF STU.NM SSS.SE SMS.SE SSM.ID SSS.PS IF SSS.PS # STF.ID AND SSS.PS # 0 AND SSM.PR = 1

**SMS:  List of Students with Teachers and Section Information for 1st Period by Teacher from Scheduling Master Schedule**

LIST STU SSS SMS CRS SSM STF STU.ID STU.NM STU.GR STF.ID STF.LN STF.FN FTF.STI SMS.RM SMS.SE CRS.CO BY STF.LN STF.FN IF FTF.STI = "###" AND SSM.PR = 1

Enter Flex Short Title for first period

**MST:  List of Teachers and Course Information for a Specific Period**

LIST MST CRS SSE STF MST.FSQ STF.ID STF.LN STF.FN MST.RM MST.SE CRS.CO BY STF.LN STF.FN SSE.PR IF MST.FSQ = "XXX" AND SSE.PR = 1

Enter Flex Short Title for period