# Quick Reference

## Scheduling For a New Year

This document is intended as a quick reference tool only. Please refer to the on-line help or the web2school manuals for more details. Information may change without notice.

### Getting Ready

- **Create the new year.** *You must have full administrator permissions, or log in as superuser to create the year. When the new year is created, a new database is built into which the data is copied.

> *What gets copied?* All students (active and inactive), courses, personnel, student health information, custom export templates, the master schedule, all *setup* information for attendance, categories, discipline, elementary grades, grade books, health, homerooms, scheduling, and standards.
>
> *What is not copied?* Student schedules, teacher grade books, student discipline data, student attendance, student standards data. (Transcripts are not copied at this time, because final grades have not been submitted. In the fall, when you Calculate GPA for the first time, transcript data will pull forward.)

  → Click on **Setup – Years**, then click on the most recent year. The Add button will become available.

  → Click the **Add** button. Most schools will enter **12** as Grade Level of Graduating Class, and enter the year of graduation for that year's seniors, even if you are an elementary school. A few elementary schools are configured slightly differently, so you should check the previous year's setup to see how your school configures this window.

☞ Once the new year is created, you and the rest of administration staff should be mindful of the following:

  → Be very aware of which year you are working in. You do not want to accidentally run the scheduler in the current year! If you are adding a new student, be sure you are working in the current year.

  → Any updates made to student demographic information in the current year will prompt you as to whether or not you wish to update that information in the following year. Typically, you would say Yes.

- **Update your course catalog in the new year under Administration - Courses**. *Updates made in the current year will not automatically update next year.

  → You cannot delete courses, but you can make them inactive under Administration - Courses. Inactive courses in the master schedule will display in blue. You may delete these from the schedule.

  → Add any new courses that will be offered this year.

  → Inactive courses can be re-activated, and course names can be modified.

- **Update personnel in the new year under Administration - Personnel.** *Updates made in the current year will not automatically update next year.

  → You cannot delete personnel, but you can make them inactive. To help avoid confusion, some users prefer to change the name of inactive personnel to X's so that former staff no longer appear in any lists.

  → Add any new personnel for the year. You can also make name changes for marriages, etc.

  → Inactive personnel may be re-used by re-activating them and modifying the name.

- **Inactivate the students in the graduating YOG,** or the grade level that will have matriculated from your school. You may delete them later, when you certain there are no retentions.

- **Enter incoming class of students.** For example, if you are a high school, enter your incoming freshman class. If you are a middle school, enter your incoming sixth graders. If the previous school for these students uses Web2School, an administrator can simply Export a Grade Level from the sending school, send it to the new school, and Import a Grade Level. Call Web2school for assistance, as needed.

## Begin the Scheduling Process

- **Verify the information under Setup-Scheduling.** Be sure that rotations and schedule information still matches your requirements. Fields that are grayed out must be changed by Web2School.

- **Enter student course requests.** You may do this using Administration - Schedule Builder – Student Course Requests or –Block Modify Course Requests. To determine if any students do not have requests in the system, you may go to Reports –System Reports – Schedule Builder, and run Students Without Course Requests.

- **Determine how many sections of each class are needed.** Go to Reports - System Reports – Schedule Builder Reports, then run the Simple Tally Report to determine the number of sections required for each course.

- **Determine whether you want to build the schedule manually or re-use last year's (perhaps with minor tweaking, such as additional sections, a new course or two, a change in teacher).**

  → If you wish to start over and build the schedule manually or allow the system to build it for you, go (with great caution) to Tools/Global/Schedule and select Delete Master Schedule. Once deleted, you cannot get this schedule back, so be very certain you intend to completely remove the Master Schedule.

  → To build manually from scratch or re-use last year's schedule, go to Administration-Scheduling-Modify Master Schedule and add/modify as needed.

  → To allow the system to build the new schedule using Schedule Builder, you must first delete the old schedule. Be sure all information in Preliminary Data, Teacher Resources, and Room Resources under Administration-Schedule Builder is filled in and current.

- When running the Schedule Builder, for the first few runs, run just **Build and Assign for the first few times** as you tweak and make adjustment to the schedule. Later you can just run Assign. ** Delete Student Schedules between each run if you wish to see new totals and assignments with each run.

- **Determine how fully the students were scheduled.** When students have been assigned into courses, there are several reports under Reports – System Reports – Schedule Builder that are very useful. **Please note that once you have hand-manipulated the schedule to override the build process, the Schedule Builder reports no longer reflect the schedule and the results of your build.

  → **Student Scheduling Completion** – This report indicates the number of students assigned to classes based on the number of course requests fulfilled. The completion rate will be low if you allow students more requests than can physically be fulfilled.

  → **Scheduling Statistics (Report and Details)** – This report helps you to determine which courses in the master schedule are not receiving students because of their placement. The details will explain which students were kept out and what the conflict was.

- Resolve conflicts to schedule students as completely as possible. When schedules are filled in as much as possible, you are ready to plan for scheduling study halls. There are several very useful reports to assist you.

  → **Schedule Matrix Report** – where students are by term, day, and period

  → **Master Schedule Report** – layout of entire master schedule, including number of students assigned

  → **Student Unfilled Time Totals** – indicates by term/day combinations those who do not have a class

- Add your study halls to the Master Schedule. Go to Schedule Builder and assign Study Halls.
- Print Student Schedules.

SCHEDULING A NEW YEAR