

Quick-Start Guide for Scheduling at the Elementary Level

Step 1. Define your Academic Year School Terms and Settings

You must configure the **Academic Year School Term** settings before you can create the calendar in Calendar Maintenance. Click **School Term Maintenance / School Terms /Add**.

Define term **Code, Order, Start and End Dates** for each term. Click **Submit**.

School Term Maintenance		
Academic Year Settings	Calculate Filled Count	Lock Schedules
Move Course Meeting Time	Recommendation Configuration	Rotation
School Types	Day Names	Course Types
Term Codes	School Terms	School Periods
Rotation	Grade Scheduling Weights	

>> SCHOOLTERM

Academic Year: 2009-2010

Term Code: Q1

Term Order: 1

Start Date: 09/05/09

End Date: 11/04/09

After the School Terms have been defined, in **Scheduling System** Click **Maintenance – Scheduling>Academic Year Settings**.

Define your academic year settings by highlighting days, terms and periods. Enter the term start and end dates in the boxes below. Set the max periods per day and select rotating or fixed schedule. Once complete, you can create your school calendar.

Adams Elem		
Academic Year Settings	Calculate Earned Credits	Calculate Filled Count
Course Types	Day Names	Grade Scheduling
Rotation	Rotation By Grade Level	School Periods
School Terms	Term Codes	

Scheduling System

- [Modify Schedules](#)
- [Course Catalog](#)
- [Master Schedule Builder](#)
- [Requests](#)
- [Run Student Scheduler](#)
- [Scheduler History](#)
- [Schedule Study Halls](#)
- [Teacher Schedule](#)
- [Locate a Course](#)
- [Reports - Scheduling](#)
- [Maintenance - Scheduling](#)

Create the School Calendar

Click on **Calendar Maintenance**

Verify/change:

School Year

Start Date

End Date

Click **Submit** if changes are made.

Note:

The Calendar Years table is District based. Additions/Modifications should be done by your iPass District Super User, who should notify all schools when this step has been completed.

School Calendar Maintenance

Attendance Codes	Attendance Configuration
Calendar Maintenance	Calendar Maintenance via List
Enter/Modify Holidays	School Attendance Parameters

>> SCHOOL CALENDAR MAINTENANCE

School: Adams Elementary School

School Year: 2010-2011

Create School Calendar

Start Date: Mar 22 2010

End Date: Mar 22 2010

Enter/Modify Holidays

Click on **Enter/Modify Holidays**

Enter in any holidays or non-school days that affect your particular school.

You will need to define **Course Types, Rotation, School Terms, Day Names, Rotation by Grade Level, Term Codes, Grade Scheduling Weights, and School Periods** by clicking on each tab and completing the requires data fields.

Course Types

Please note: Course types that are to be included in the EPIMS export report must have **is EPIMS** set to Yes.

Rotation
Define
Master
Bell
Rotation

Cycle Periods For: Adams Elementary School

★ **Adams Elementary School** School Year: 2009-2010 ★

	Monday	Tuesday	Wednesday	Thursday	Friday
Period 1	Period: Period 1 Start: 08:00 End: 12:00	Period: Period 1 Start: 08:00 End: 12:00	Period: Period 1 Start: 08:00 End: 12:00	Period: Period 1 Start: 08:00 End: 12:00	Period: Period 1 Start: 08:00 End: 12:00
Period 2	Period: Period 2 Start: 12:01 End: 15:00	Period: Period 2 Start: 12:01 End: 15:00	Period: Period 2 Start: 12:01 End: 15:00	Period: Period 2 Start: 12:01 End: 15:00	Period: Period 2 Start: 12:01 End: 15:00

➤ SUBMIT ➤ CANCEL

School Term
Define Terms,
Term order, start
and end dates.

» SCHOOLTERM

Academic Year: 2009-2010
 Term Code: T1
 Term Order: 1
 Start Date: 09/01/09
 End Date: 12/01/09

➤ SUBMIT ➤ CANCEL ➤ DELETE

Day Names

Day Names can be days of the week, Day 1, Day 2, Day 3; or Days A, B, C, D, etc. Be sure to set the Day Order for proper rotation.

» SCHOOL CYCLE MAINTENANCE

Delete	Day Title	Abbreviation	Day Order
Check All Clear All			
<input type="checkbox"/>	Monday	Mon	1 ▼
<input type="checkbox"/>	Tuesday	Tues	2 ▼
<input type="checkbox"/>	Wednesday	Wed	3 ▼
<input type="checkbox"/>	Thursday	Thurs	4 ▼
<input type="checkbox"/>	Friday	Fri	5 ▼

» SCHOOL CYCLE MAINTENANCE

Delete	Day Title	Abbreviation	Day Order
Check All Clear All			
<input type="checkbox"/>	DAY 1	1	1 ▼
<input type="checkbox"/>	DAY 2	2	2 ▼

Rotation by Grade Level
 Each grade level can have a separate bell schedule

Cycle Periods For: Adams Elementary School

Adams Elementary School School Year: 2009-2010

Grade Level: 01

	Monday	Tuesday	Wednesday	Thursday	Friday
Period 1	Period: Period 1 Start: 08:00 End: 12:00				
Period 2	Period: Period 2 Start: 12:01 End: 15:00				

Term Codes
 Term codes may be defined as T1, T2, T3 to represent trimesters, or Q1, Q2, Q3, Q4 to represent four quarter terms.

» SCHOOL TERMS

Delete	Term Code	Description	Abbreviation
<input type="checkbox"/>	T1	Term 1	T1
<input type="checkbox"/>	T2	Term 2	T2
<input type="checkbox"/>	T3	Term 3	T3
<input type="checkbox"/>	T4	Term 4	T4

Grade Scheduling Weights

Assign Weights to Grade Levels for Scheduling Priority
 For: Adams Elementary School

Grade	Weight
01	10
02	10
03	10
04	10
KF	10
PK	10

School Periods

» Periods for Adams Elementary School

Order: 1

Title:

Abbreviation:

Start Time:

End Time:

Visit the **Scheduling** folder in the [Resource Center](#) to view videos, Help documents, FAQ, and Webex sessions.

Step 2. Define your Academic Year Schedule Parameters

Select <**Scheduling System**> <**Maintenance**> <**Academic Year Settings**>. This screen allows you to define those fields which dictate the basic format of your schedule. These settings are unique for the school and the academic year.

Adams Elementary School School Year: 2009-2010

School Year Parameters For Adams Elementary School

Days In Cycle: 5 Max Periods: 2
Cycle Type: Fixed Use Period Attendance: Yes
Display MSB Fields: Yes
Default Schedule: Period & Summary

Terms	Days	Periods
T1	Monday	Period 1
T2	Tuesday	Period 2
T3	Wednesday	
	Thursday	
	Friday	

Term Details

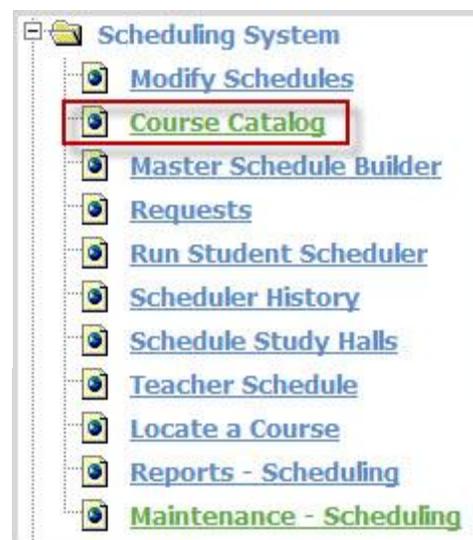
Term	Start Date	End Date	Order
T1	09/01/2009	12/01/2009	1
T2	12/02/2009	03/01/2010	2
T3	03/02/2010	06/01/2010	3

Step 3. Define New Courses

This is a District specific table that is shared by all schools. Courses offered by the District are added and/or modified in this tab.

⇒ Select <**Scheduling System**> <**Course Catalog**> <**Course maintenance**>.

⇒ Click to add a new Course.



Click **ADD** to add a new Course.

Enter the name of the Course as it will appear on most documents and reports. It will be truncated on some internal reports, such as the Master Schedule and Course Catalog reports.



The screenshot shows a window titled "COURSE MAINTENANCE". At the top right, there is a green button with a double arrow and the text "ADD". Below this is a table with two columns: "Course Name" and "Course Title". The table has a header row with a light green background and one empty data row below it.

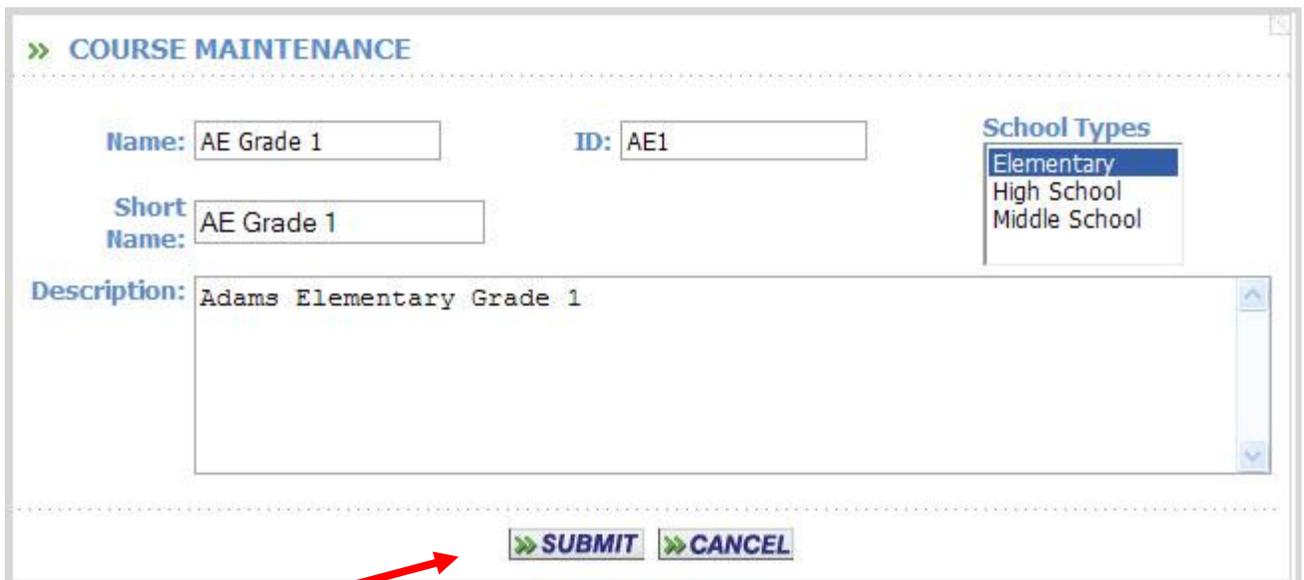
The ID can be numeric, alpha or any combination of alpha-numeric characters. The course numbers must be unique within the District. If you want unique numbers for a specific school, then you must construct such a numbering scheme.

Course IDs cannot contain spaces. A Course ID of more that 6 characters may not print fully on all reports.

NOTE: If you modify the Name, ID, Short Name or Description of a course, then ALL courses in ALL years in ALL schools will automatically be modified, since this is the table that stores these values. Transcript records are not affected by such a change unless you re-post a final grade.

Helpful Hint!

Rename all of your Courses to be Upper/Lower case format. They look better and take up less space on critical documents like Transcripts and Report Cards



The screenshot shows a form titled "COURSE MAINTENANCE". It contains several input fields: "Name:" with the value "AE Grade 1", "ID:" with the value "AE1", "Short Name:" with the value "AE Grade 1", and "Description:" with the value "Adams Elementary Grade 1". To the right of the "Name" and "Short Name" fields is a dropdown menu titled "School Types" with options "Elementary", "High School", and "Middle School". At the bottom of the form, there are two buttons: "SUBMIT" and "CANCEL". A red arrow points from the text "Click SUBMIT" below to the "SUBMIT" button.

Click **SUBMIT**

Step 4. Move Courses to the Course Catalog.

Transfer courses into the Course Catalog for your school for a specific Academic Year.

Select <Scheduling System> <Course Catalog> <Move Courses to Catalog>.

Move Courses to Catalog

Choose:

Correct **School Year**

School Types – All

Select **All Courses**

Click **SUBMIT**

Select Courses For Academic Year
School: Adams Elementary School
Academic Year: 2010-2011
School Types: All
Select Courses:
AE1 AE Grade 1
AE2 AE Grade 2
AEArt AE Art
AEGrade3 AE Grade 3
AEMusic AE Music
AEPHysEd AEPHysEd
AEPReK AE PreK
*Courses that already exist for the school/academic year combination will be skipped
SUBMIT CANCEL

Step 5. Edit Course Details

The **Course Details**, including the sections, were rolled over in Step #5 as well as the schedule Rotation. Based on the data in your reports, the number of sections, other values (number of seats, credits, curriculum level, etc.) and the rotation may need to be modified.

Select <Scheduling System> <Course Catalog> <Course Details>

Course Details

Click on the **course ID** to edit

ID	Name	Dept		
AE1	AE Grade 1	ELEM		
AE2	AE Grade 2	ELEM		
AEArt	AE Art	ELEM		
AEGrade3	AE Grade 3	ELEM		
AEMusic	AE Music	ELEM		
AEPHysEd	AEPHysEd	ELEM		
AEPReK	AE PreK	ELEM		

Use these fields to: define newly created courses that have been moved to your course catalog, **MODIFY:**

- **Number of Terms**
- **Number of Sections**
- **Section Names**
- **Course Type**
- **Max Seats**
- **Has Meeting Time**
- **Department**

The Course Details data is *unique* to the Academic Year.

Teacher, Room, Term and Meeting Time assignments can be changed in <**Course Schedule**> or by clicking on the Schedule link to the right of the section information.

Every Course MUST have at least a single Section defined!

The section can have whatever ID you wish, but it cannot be deleted.

Helpful Hint: Naming your sections using teacher name or homeroom number can help you easily identify groups of students for scheduling and grading.

Elementary schools may set all Core Elementary Courses to have a meeting time, and all specials to be non-meeting time courses.

School Course Maintenance | iPass | Adams Elementary School | 2009-2010

>> ADAMS ELEMENTARY SCHOOL : AE GRADE 1

< Prev GoTo: [] Next >

Course ID: AE1 Short Name: AE Grade 1 Academic Year: 2009-2010
Description: Adams Elementary Grade 1

>> COURSE DETAILS

Course Type: Academic Major/Minor: Major Priority: 5
Number of Requests: 0 Number of Alt Requests: 0
Number of Sections: 4 Has Meeting Time: Yes # of Terms: 3 Cont?:
GPA Rank: Yes Honor Type: Ineligibility Type:
Curriculum Level: 1 Use Detailed Schedule: No AP Courses (DOE):
Subject Area/Course (EPIMS): All Subjects

Print Class List: Yes Print On Transcript: Yes
From Grade: 01 To Grade: 01 Failure: Yes
Horizontal Avg: Yes Vertical Avg: Yes
Vertical Weight: 1.00 Number Of Periods: 0
Pass/Fail: No Max Seats: 30
Linked Course: Pre-Schedule:

>> MASTER SCHEDULER BUILDER DETAILS

Use with MSB Meets same period Must meet in consecutive terms
Number of Periods/Cycle: MSB Rank: 5041699 Update Rank
Additional Meeting Times: N/A
[Course Section Details](#)

>> COURSE COMPETENCIES

>> ADD

>> COURSE SECTION DETAIL

Departments		Course Sections					
Department	Credits	Delete	Section Name	Max Seats	Horz Avg	Filled	Schedule
Elementary	0.00	<input type="checkbox"/>	Morg:	22		0	Schedule
		<input type="checkbox"/>	OCon	22		0	Schedule
		<input type="checkbox"/>	Olear	22		0	Schedule
		<input type="checkbox"/>	Smith	22		0	Schedule

Delete

>> SUBMIT >> CANCEL

Step 6. Add/Modify Room Location

Assign a room location for the course.
In **Administration** click **School Resources**.



Click on the **Room Catalog** tab.



Click on **ADD** or the name of the school.



Complete the data fields
and click **SUBMIT**



A screenshot of a form titled "» ADAMS ELEMENTARY SCHOOL - TECH". The form contains several fields: "Room Code" (text input with "Tech"), "Description" (text input with "Technology Lab"), "Building" (dropdown menu with "3"), "Capacity" (text input with "25"), "Grade Level" (text input with "3"), and "Home Room" (dropdown menu with "No"). Below the form, there are three buttons: "» SUBMIT", "» CANCEL", and "» DELETE".

Step 6. Schedule Course - Define Teacher and Room Assignments for each section

Course Schedule

Select **Course Schedule** from the tab menu.

Click on the **ID course name**.

>> COURSE SCHEDULE

>> SUBMIT

▼ Courses ▼

ID ▼	Name	Dept		
AE1-OConnor	AE Grade 1	ELEM		
AE1-Oleary	AE Grade 1	ELEM		
AE1-Smith	AE Grade 1	ELEM		
AE1-Morgan	AE Grade 1	ELEM		
AE2-01	AE Grade 2	ELEM		
AEArt-OConnor	AE Art	ELEM		
AEGrade3-OConnor	AE Grade 3	ELEM		
AEGrade3-Iane	AE Grade 3	ELEM		
AEMusic-OConnor	AE Music	ELEM		
AEMusic-Morgan	AE Music	ELEM		
AEPHysEd-OConnor	AEPHysEd	ELEM		
AEPReK-PMMorgan	AE PreK	ELEM		
AEPReK-AMMorgan	AE PreK	ELEM		

<< Prev

>> SUBMIT

Schedule the course by

Highlighting Term(s)

Selecting Teacher(s)

Teacher Name to Print

Room Assignment and Grade Level.

Select the **Periods** when the course will meet.

Click **SUBMIT**

>> ADAMS ELEMENTARY SCHOOL : AE GRADE 3

Course ID: AEGrade3-OConnor **Short Name:** AE Grade 3 **School Year:** 2009-2010
Description: Adams Elementary Grade 3

>> COURSE SCHEDULE

Select Term (s): T1 T2 T3

Select Teacher (s): James, Christopher
Kelly, Erin
Lane, Mary
Morgan, Ann
 O'Connor, Sharon

Teacher Name to Print:
Optional, overrides selected teacher. Useful for team teaching.

Room:

Grade:

Delete this course schedule

	Monday	Tuesday	Wednesday	Thursday	Friday
Period 1	<input checked="" type="checkbox"/> Period 1				
Period 2	<input checked="" type="checkbox"/> Period 2				

>> COURSE SCHEDULE

Select Term (s): T1 T2 T3

Select Teacher (s): James, Christopher
Kelly, Erin
Lane, Mary
Morgan, Ann
 Lane, Mary

Teacher Name to Print:
Optional, overrides selected teacher. Useful for team teaching.

Room:

Grade:

Delete this course schedule

	Monday	Tuesday	Wednesday	Thursday	Friday
Period 1	<input checked="" type="checkbox"/> Period 1	<input type="checkbox"/> Period 1	<input type="checkbox"/> Period 1	<input checked="" type="checkbox"/> Period 1	<input type="checkbox"/> Period 1
Period 2	<input type="checkbox"/> Period 2	<input checked="" type="checkbox"/> Period 2	<input checked="" type="checkbox"/> Period 2	<input type="checkbox"/> Period 2	<input checked="" type="checkbox"/> Period 2

>> COURSE SCHEDULE

Select Term(s): Q1
Q2
Q3
Q4

Select Teacher(s): Aaron, Mary
Griffin, James
Morgan, Ann
O'Connor, Sharon
X Morgan, Ann

Teacher Name to Print: Uses Period Attendance

Room: Grade:

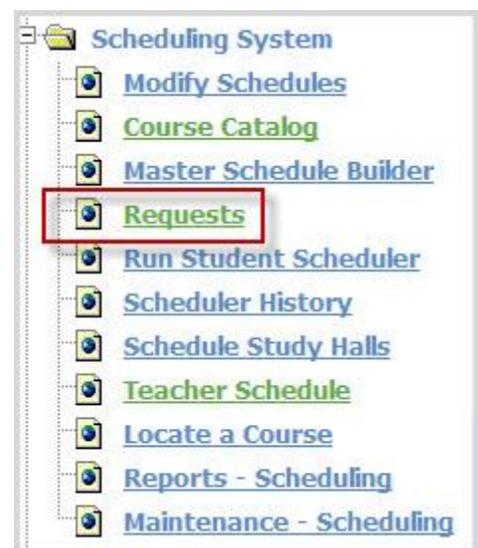
Delete this course schedule

	Day 1	Day 2	Day 3	Day 4	Day 5
Period 1	<input type="checkbox"/> A-block				
Period 2	<input checked="" type="checkbox"/> B-block	<input type="checkbox"/> B-block	<input checked="" type="checkbox"/> B-block	<input type="checkbox"/> B-block	<input checked="" type="checkbox"/> B-block
Period 3	<input type="checkbox"/> C-block	<input checked="" type="checkbox"/> C-block	<input type="checkbox"/> C-block	<input checked="" type="checkbox"/> C-block	<input type="checkbox"/> C-block
Period 4	<input type="checkbox"/> D-block				
Period 5	<input type="checkbox"/> E-block				
Period 6	<input type="checkbox"/> F-block				
Period 7	<input type="checkbox"/> G-block				

Step 7. Mass Load Students into Courses

In Scheduling System select Requests.

Select Mass Load Schedules & Requests



Student Search Criteria:

Use the lower part of the screen first to search for students to update; search by grade level, homeroom or gender. Select the students to be updated once the search is complete.

Course to Add/Remove:

Using the Course Lookup tool, add the Course ID# and then the Section # that you wish to add, delete or delete and unschedule to the selected student schedules.

Click Submit

The screenshot shows the 'Course To Add/Remove' and 'Student Search Criteria' sections of the iPass system. At the top, the 'School Year' is set to 2009-2010. The 'Course ID#' is 'Atech' and the 'Section #' is '03Morgan'. Below this, the 'Add/Remove' action is set to 'Add'. The 'Student Search Criteria' section includes fields for 'School' (Adams Elementary School), 'Student Id', 'Last Name', 'Homeroom' (with a dropdown menu showing 101, 102, ART, GYM, MUSIC), 'Grade' (with a dropdown menu showing PK, KF, 01, 02, 03, and a selected 'X 03'), 'Gender' (Both), 'Cycle/Cluster', and 'Group'. There are also fields for 'Incoming Only' (No) and 'Search Course Academic Year' (2009-2010). At the bottom of the search criteria, there are 'Course ID#' and 'Section #' fields with search icons. Below the search criteria is a 'Report Parameters' section with a 'To:' field (amorgan@imgsoftware.com), a 'CC List:' field, and a 'Priority:' dropdown (Low). At the very bottom, there are 'SEARCH' and 'CANCEL' buttons.

Check the names of the students individually or use the **Check All** tool.

Check All Clear All		Students Selected to Update					
Update	Id	Name	Grade	Gender	Homeroom	Counselor	Cycle/Cluster
<input checked="" type="checkbox"/>	1007	Britton, Suzanne	03	F	102		
<input checked="" type="checkbox"/>	1009	Zajac, Mitchell	03	M	102		
Check All Clear All							Male: 1 Female: 1 Total: 2
▶▶ SUBMIT							

Visit the **Scheduling** folder in the [Resource Center](#) to view videos, FQA, Webex sessions and Help .doc for more specific details for scheduling courses in the iPass system.