# Tweaking the Master Schedule

During new-year scheduling, schools entering student requests can use one of two methods for building the master schedule.  A school may begin building all sections from scratch for the new master schedule or a school can roll and tweak their existing master schedule. This training document focuses on tweaking the existing master schedule for the new school year. Schools starting from scratch would have the option to create sections following the instructions in this document or to use the Master Schedule Builder, which is covered in a different training manual.

While working through this document, be sure that the school year has been set to the upcoming school year.

## Preparations

Ensure that all changes, as well as the work in the Builder, take place in the upcoming school year.

Verify Non-Student Data

- From the School Setup menu, verify that Periods, Calendars and Marking Period dates are accurate. This should be done even if building sections from scratch.
- From the Scheduling menu, verify that the organization and settings of the Subjects and Courses are all updated and accurate. This also applies if building from scratch.
- Ensure that any unnecessary Courses have been or are removed.

Student Requests

- Finalize all Student Requests. Run and review the Request Reports (Scheduling > Reports > Requests Reports) and correct any extra, missing or duplicate requests. It is very important to have all student requests entered and accurate in order to maximize the outcome when Tweaking the Existing Master Schedule (or building from scratch) and Running the Scheduler.

## Tweaking the Existing Master Schedule

Tweaking Courses & Sections is an alternative to using the Master Schedule Builder. If there are not a lot of changes to the Master Schedule from one year to the next, tweaking may be easier. By rolling the courses and sections from the previous school year, schools essentially have all

the sections created, including the periods, teachers, and Texas Fields. The Builder Reports, Master Schedule Report, and/or the Teacher Schedules Report can be used for guidance and to make minor tweaks to sections.

## Builder Reports

Use the Builder Reports to determine changes that will need to be made based on student requests. The two most commonly used Builder Reports are Courses with Too Many Requests and Courses with too few Requests. These reports are particularly valuable in assessing the match between demand for particular courses and sections against actual availability. The Scheduler (loads student requests into the existing sections) should not be run until all Builder Report issues have been resolved.

The Builder reports are based on requests. If there are no requests for a certain Course, the Course will not display on any of the Builder reports.

Many reports contain in-line Filters:

Click the word **Filters** to turn the filters on.

Once the filters are turned on, you will be able to filter on select columns of the table or report by typing data directly into the white text box (this will pull all data in that column that contains the characters typed).

To add more than one filter to a column, click the green plus sign.

To delete any applied filters at any time for original data, delete all characters entered in the text boxes or turn the filters off by clicking the Filters button.

To delete an added filter but keep the original, click the red minus sign.

For additional filtering options other than contains, which is the filter that is being used when characters are simply typed into the text boxes, click the gray arrow.

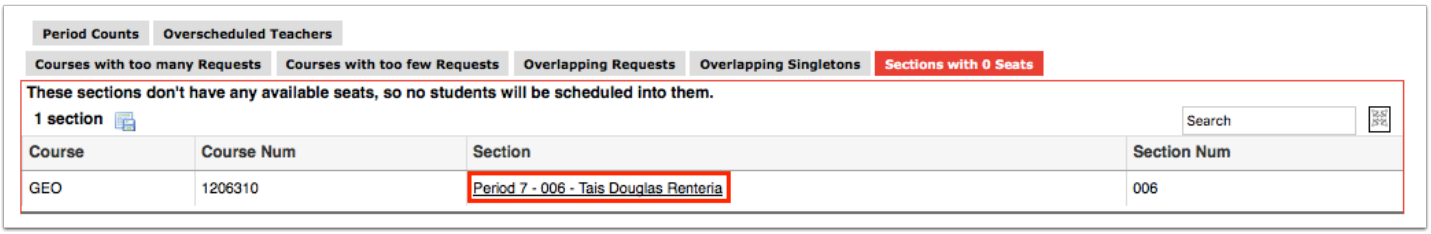
# Sections with Zero Seats Report

The Sections with Zero Seats should be viewed and/or adjusted first to give the Builder Reports a more accurate output. Students will not be scheduled into the sections if there are no seats.

**1.** Go to the **Scheduling** menu and select **Builder Reports**.

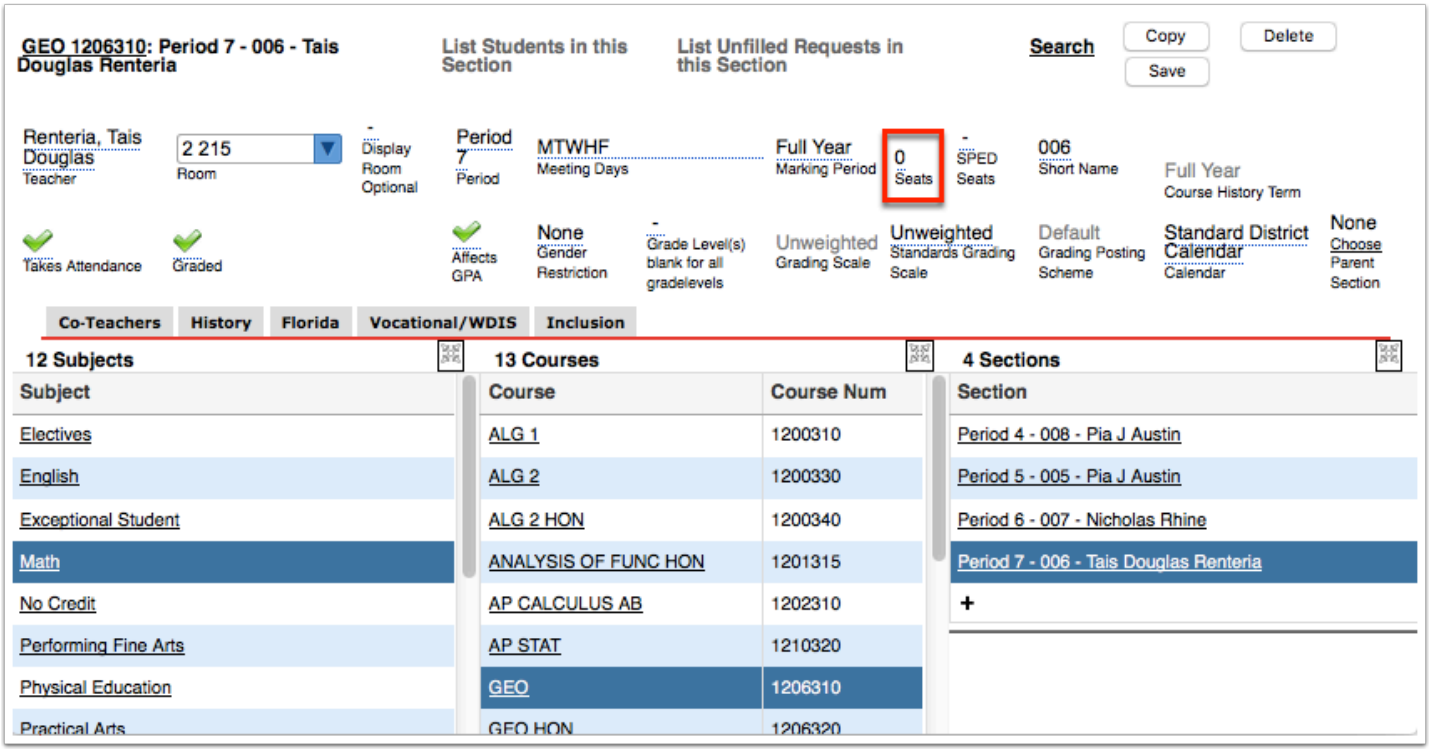
**2.** Click on the **Sections with 0 Seats** tab.

**3.** Click on the **Section** name. This opens **Courses & Sections** in a pop-up window.




**4.** Add seats to the section if the section is to be used for scheduling.

**5.** Click **Save**.

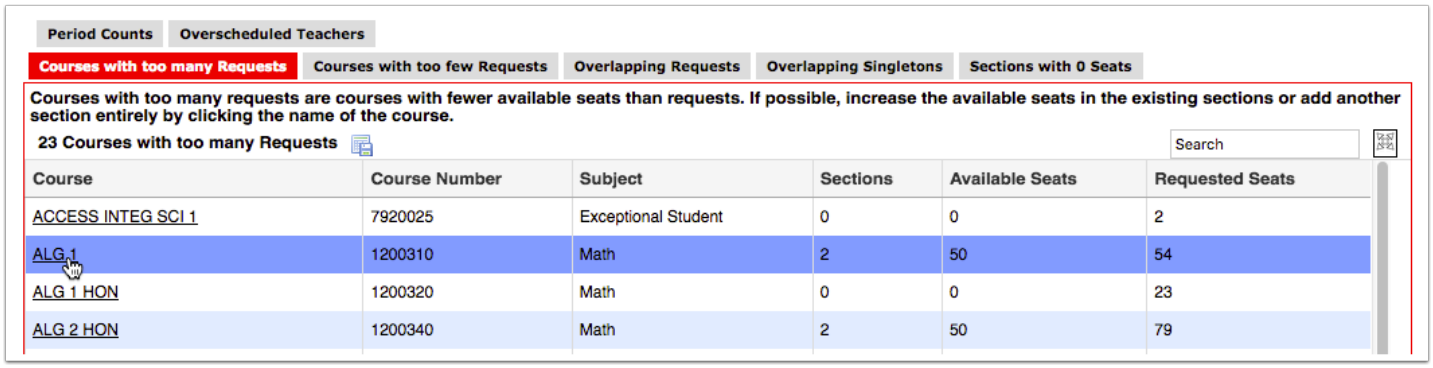


# Courses with Too Many Requests Report

This report shows the demand for seats compared to the number of seats available based on last year's Master Schedule. This report can help with the decisions for building extra sections or increasing the seat count on existing sections.

If the **Available Seats** column is blank, then no seats were assigned to the rolled course sections.

Click the **Course** name to go to the course to tweak seats at the section level or to build additional sections. New sections can be built from scratch or by copying an existing section (see instructions below).




| Course | Course Number | Subject | Sections | Available Seats | Requested Seats |
|---|---|---|---|---|---|
| ACCESS INTEG SCI 1 | 7920025 | Exceptional Student | 0 | 0 | 2 |
| ALG 1 | 1200310 | Math | 2 | 50 | 54 |
| ALG 1 HON | 1200320 | Math | 0 | 0 | 23 |
| ALG 2 HON | 1200340 | Math | 2 | 50 | 79 |

# Courses with Too Few Requests Report

Courses with too few requests are courses with less than 80% of available seats requested. This report can help with decisions to delete extra sections from the course or to dissolve the course altogether.

Student requests will need to be dropped and/or changed to a different course if deciding to dissolve a course. (Refer to Courses & Requests training document for instructions).

There are 2 ways to find a list of students requesting a Course.

- Option 1: Click the **Course** title.
- Option 2: Review the Request Reports.

Period Counts | Overscheduled Teachers

Courses with too many Requests | Courses with too few Requests | Overlapping Requests | Overlapping Singletons | Sections with 0 Seats

Courses with too few requests are courses with less than 80% of seats filled. It may be possible to delete a section or move a section to a smaller room.

135 Courses with too few Requests

Search

| Course | Course Number | Subject | Sections | Available Seats | Requested Seats |
|---|---|---|---|---|---|
| FIT ISSUES FOR ADOL | 1501320 | Physical Education | 5 | 125 | 0 |
| PEER COUN 2 | 1400310 | Electives | 2 | 50 | 0 |
| INTEG SCI 1 | 2002400 | Science | 2 | 60 | 0 |
| INTROD TO INFO TECH | 8207310 | Practical Arts | 3 | 75 | 0 |
| EXEC INTERN 2 | 0500310 | Electives | 7 | 225 | 0 |
| DIESEL ENGN SERV 3 | 8742030 | Vocational | 2 | 50 | 0 |
| CULINARY ARTS 1 | 8800510 | Vocational | 2 | 61 | 2 |

# Overlapping Requests Report

The Overlapping Requests Report is the equivalent of a Conflict Matrix Report. This report allows schedulers to see the trend for what courses students are requesting. This can assist in spreading courses with only 1 (singletons) or 2 (doubletons) sections throughout the day so that they are not offered within the same period. This report does NOT indicate that the sections are already built in the same period.

The **Requests** column shows how many students have a request for the course on the left; in the Most Common columns, the number in parentheses references how many of those students also have a request for one of these courses.

Period Counts | Overscheduled Teachers

Courses with too many Requests | Courses with too few Requests | Overlapping Requests | Overlapping Singletons | Sections with 0 Seats

☑ Only Singletons

☑ Only Singletons in the Same Period

66 Courses

Search

| Course | Course # | Requests | 1st Most Common | 2nd Most Common | 3rd Most Common | 4th Most Common | 5th Most Common | 6th Most Common | 7th Most Common | 8th M Com |
|---|---|---|---|---|---|---|---|---|---|---|
| AP 2-D ART & DESIGN | 0109350 | 43 | AP CALCULUS AB (16) | AP 3-D ART & DESIGN (16) | | | | | | |
| AP 3-D ART & DESIGN | 0109360 | 25 | AP CALCULUS AB (25) | AP 2-D ART & DESIGN (16) | | | | | | |
| AP CALCULUS AB | 1202310 | 53 | AP 3-D ART & DESIGN (25) | CULINARY ARTS 4 (22) | AP 2-D ART & DESIGN (16) | | | | | |
| AP CHEM | 2003370 | 40 | CHORUS 1 (8) | AP SPANISH LANG & CU (7) | | | | | | |
| AP COMPUTER SCIENCE PRIN | 0200335 | 18 | | | | | | | | |
| AP DRAWING | 0104300 | 22 | CULINARY ARTS 4 (12) | | | | | | | |
| APPLD ENG TECH I | 8401110 | 0 | | | | | | | | |
| AP SPANISH LANG & CU | 0708400 | 86 | PRE-CALCULUS HON (8) | AP CHEM (7) | | | | | | |
| AP SPANISH LIT & CU | 0708410 | 80 | | | | | | | | |

Click on the **Course** to view the list of students and access their requests screen.

Selecting the **Only Singletons** check box will show overlapping requests for courses that are only offered once in the school day (singletons).

Once this option is selected, an additional option to show **Only Singletons in the Same Period** may be selected. This does not display WHICH period the sections share. To view the specific periods, click on the next tab in the report.

Period Counts | Overscheduled Teachers

Courses with too many Requests | Courses with too few Requests | Overlapping Requests | Overlapping Singletons | Sections with 0 Seats

☑ Only Singletons
☑ Only Singletons in the Same Period

66 Courses

Search

| Course | Course # | Requests | 1st Most Common | 2nd Most Common | 3rd Most Common | 4th Most Common | 5th Most Common | 6th Most Common | 7th Most Common | 8th M Com |
|---|---|---|---|---|---|---|---|---|---|---|
| AP 2-D ART & DESIGN | 0109350 | 43 | AP CALCULUS AB (16) | AP 3-D ART & DESIGN (16) | | | | | | |
| AP 3-D ART & DESIGN | 0109360 | 25 | AP CALCULUS AB (25) | AP 2-D ART & DESIGN (16) | | | | | | |
| AP CALCULUS AB | 1202310 | 53 | AP 3-D ART & DESIGN (25) | CULINARY ARTS 4 (22) | AP 2-D ART & DESIGN (16) | | | | | |
| AP CHEM | 2003370 | 40 | CHORUS 1 (8) | AP SPANISH LANG & CU (7) | | | | | | |
| AP COMPUTER SCIENCE PRIN | 0200335 | 18 | | | | | | | | |
| AP DRAWING | 0104300 | 22 | CULINARY ARTS 4 (12) | | | | | | | |
| APPLD ENG TECH I | 8401110 | 0 | | | | | | | | |
| AP SPANISH LANG & CU | 0708400 | 86 | PRE-CALCULUS HON (8) | AP CHEM (7) | | | | | | |
| AP SPANISH LIT & CU | 0708410 | 80 | | | | | | | | |

If the number of overlapping requests is small, schedulers may want to make a choice for students in terms of the requests. If the number of overlapping requests is large, one of the sections may need to be moved to a different period or additional sections could be added to accommodate student requests.

Be sure to view the Overlapping Singletons tab on BEFORE moving any sections to a different period.

# Overlapping Singletons Report

Overlapping Singletons are courses that only have one single section and meet the same period as other singleton sections. If students have requests for both sections, they will only be scheduled into one of them. This report can be viewed prior to making changes to period offerings.

If possible, change the period in which the section is scheduled or add another section.

Period Counts | Overscheduled Teachers

Courses with too many Requests | Courses with too few Requests | Overlapping Requests | **Overlapping Singletons** | Sections with 0 Seats

**Overlapping Singletons are two courses with only one section that both meet on the same period. Students who request both courses can be scheduled into only one of them. Click the course to add a section or change the period on which it meets.**

**7 Periods** Search

| Period | Singletons | |
|---|---|---|
| Period 1 | 1700370 - CRIT THINK ST SKLS<br>1700410 - AVID 3<br>2500510 - TEMP INSTR PLACEMENT | 7910111 - ACCESS ENGLISH 1/2<br>7963170 - U SKLS: CURR&LRN9-12<br>8751210 - COMM FISH 1 |
| Period 2 | 1006300 - JOURN 1<br>1006310 - JOURN 2<br>1006320 - JOURN 3<br>1006330 - JOURN 4<br>2003421 - AP PHYSICS 1<br>2500510 - TEMP INSTR PLACEMENT<br>7921015 - ACCESS US GOVT | 7921022 - ACCESS ECON FIN LIT<br>7963140 - SELF-DETERMINATION<br>8751220 - COMM FISH 2<br>8751230 - COMM FISH 3<br>8751240 - COMM FISH 4<br>9504220 - OUTBOARD MARINE 2 |
| Period 3 | 1502410 - INDIV/DUAL SPRTS 1<br>1502420 - INDIV/DUAL SPRTS 2<br>1700380 - CAR RESA&DECI MAK<br>2003370 - AP CHEM | 2003380 - PHYS 1<br>2106370 - COMPRE LAW STUDIES<br>7912065 - ACCESS GEOMETRY<br>7912080 - ACCESS ALGEBRA 1A |
| Period 4 | 0104370 - PAINT 1<br>0104380 - PAINT 2<br>1700420 - AVID 4<br>2500510 - TEMP INSTR PLACEMENT<br>7920020 - ACCESS E/S SCI | 7963010 - PREP AD LIV<br>8800530 - CULINARY ARTS 3<br>8800540 - CULINARY ARTS 4<br>9504130 - AUTO MAINT/LT RPR 3 |
| Period 5 | 0400700 - MUSIC THEATRE 1<br>0400710 - MUSIC THEATRE 2<br>1202320 - AP CALCULUS BC<br>2000340 - AP BIO<br>2002500 - MARINE SCI 1 | 2003340 - CHEM 1<br>7912090 - ACCESS ALGEBRA 1B<br>8772430 - DIG VID PROD 3<br>8772440 - DIG VID PROD 4<br>9504120 - AUTO MAINT/LT RPR 2 |

# Period Counts Report

This report lists the number of seats, courses, and sections in each period. These numbers should be fairly balanced among the periods.

For Middle Schools, the number of available seats should at least be equal to the number of students enrolled as they are typically in school for all periods.

For High Schools, consider the times of day when a large number of students may be off campus for OJT or Dual Enrollment courses, for example.

Courses with too many Requests | Courses with too few Requests | Overlapping Requests | Overlapping Singletons | Sections with 0 Seats

**Period Counts** | Overscheduled Teachers

**This report lists the number of seats, courses, and sections in each period. These numbers should be fairly balanced among each of the periods. If you have to add or move a section, it might be best to add or move it to a period with few sections.**

**7 Periods** Search

| Period | Available Seats | Courses Offered | Number of Sections |
|---|---|---|---|
| Period 1 | 1117 | 41 | 42 |
| Period 2 | 1385 | 51 | 51 |
| Period 3 | 1231 | 45 | 45 |
| Period 4 | 1283 | 46 | 46 |
| Period 5 | 1450 | 50 | 50 |
| Period 6 | 1395 | 51 | 51 |
| Period 7 | 2041 | 57 | 57 |

If sections need to be added, it is recommended to add the sections to periods with fewer sections.

For schools who use rotation days, a Rotation Day column is added to the report. The report displays the period counts broken down by rotation day.

Courses with too many Requests | Courses with too few Requests | Overlapping Requests | Overlapping Singletons | Sections with 0 Seats

Period Counts | Overscheduled Teachers

This report lists the number of seats, courses, and sections in each period. These numbers should be fairly balanced among each of the periods. If you have to add or move a section, it might be best to add or move it to a period with few sections.

31 Periods

Search

| Period | Rotation Day | Available Seats | Courses Offered | Number of Sections |
|---|---|---|---|---|
| Period 1 | | 433 | 15 | 18 |
| Period 1 | A | 155 | 5 | 6 |
| Period 1 | C | 342 | 17 | 18 |
| Period 1 | B | 187 | 12 | 12 |
| Period 2 | | 624 | 24 | 30 |
| Period 2 | A | 58 | 3 | 3 |
| Period 2 | C | 205 | 10 | 11 |
| Period 2 | B | 147 | 7 | 8 |
| Period 3 | | 431 | 17 | 18 |
| Period 3 | A | 222 | 10 | 11 |
| Period 3 | C | 406 | 17 | 19 |
| Period 3 | B | 184 | 7 | 8 |
| Period 4 | | 338 | 20 | 20 |
| Period 4 | A | 179 | 9 | 9 |
| Period 4 | C | 396 | 18 | 19 |
| Period 4 | B | 217 | 9 | 10 |
| Lunch A | | 0 | 1 | 1 |

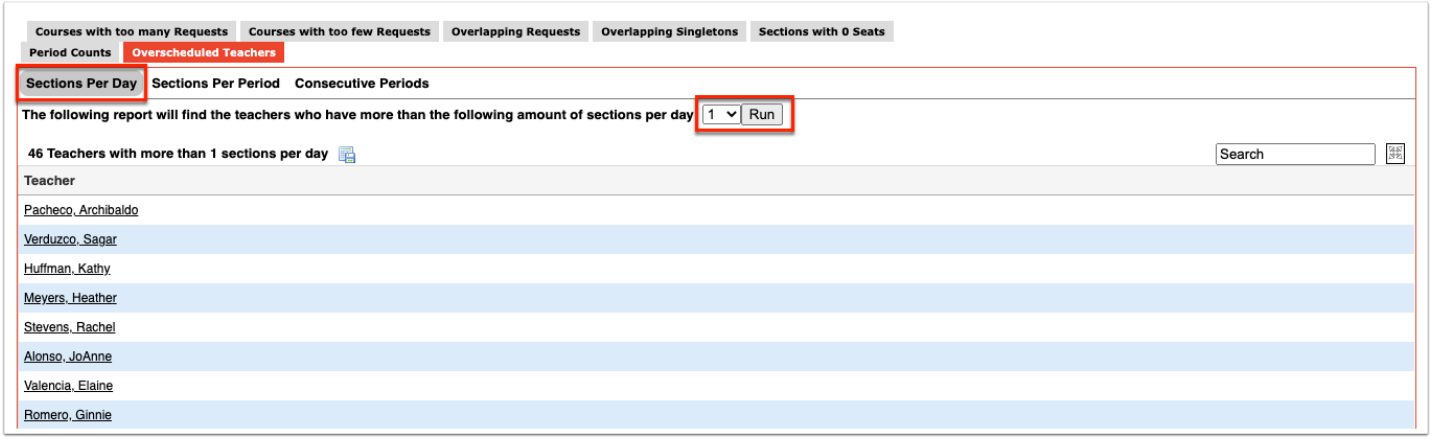
# Overscheduled Teachers Report

Though this report can be viewed throughout the building process, it is recommended that this report be used AFTER all necessary changes to the Master Schedule have been completed.

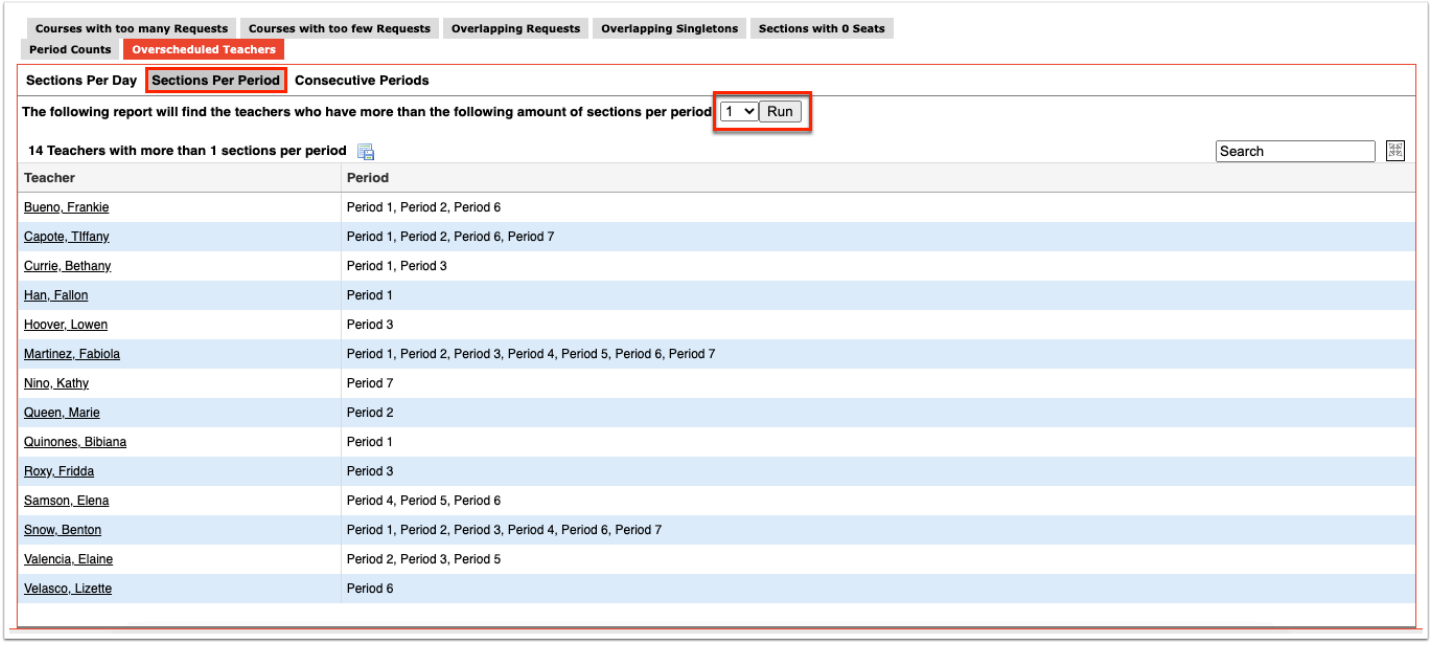
This report can be modified to view teachers scheduled into a specific number of periods per day and may be helpful for finding those teachers missing required planning periods or with multiple sections scheduled during the same period.

On any of the tabs, clicking on the teacher's name defaults to the teacher's User Info page where the teacher's schedule can be viewed.

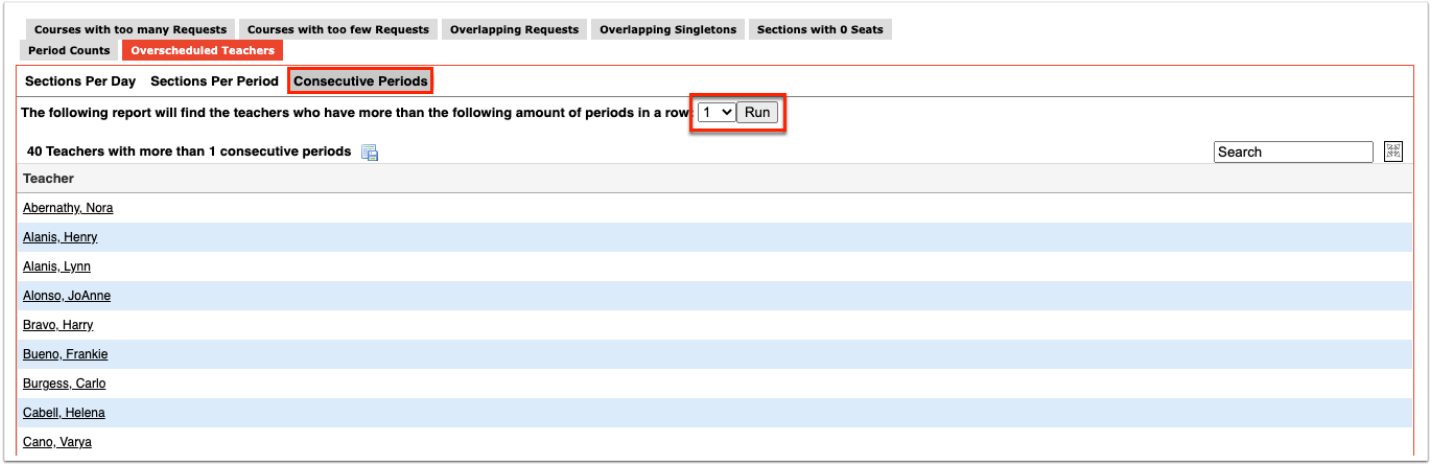
**Sections Per Day** (set the appropriate number and click **Run**)




## **Sections Per Period** (set the appropriate number and click **Run**)




## **Consecutive Periods** (set the appropriate number and click **Run**)



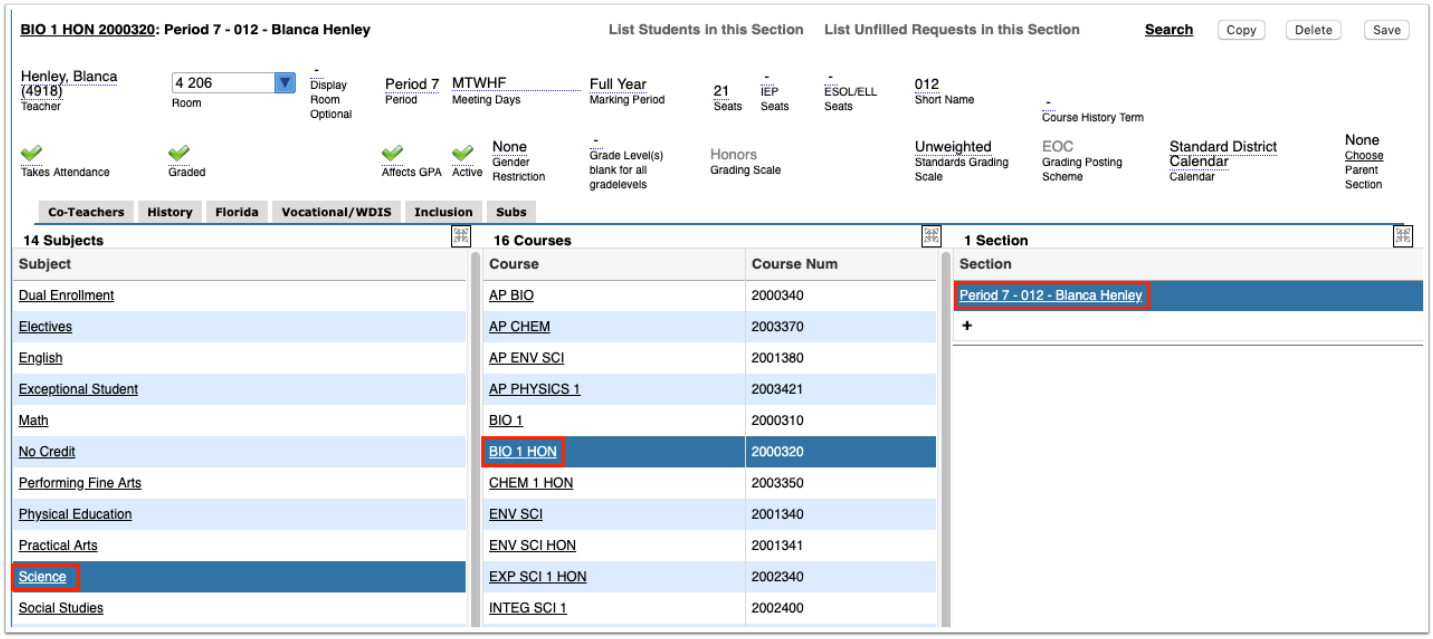
# Viewing, Editing, and Moving Sections

In addition to making tweaks to the Master Schedule from within the Builder Reports, scheduling teams can go directly to Courses & Sections to make tweaks.

## Viewing and Editing Sections

**1.** Go to the **Scheduling** menu and select **Courses & Sections**.

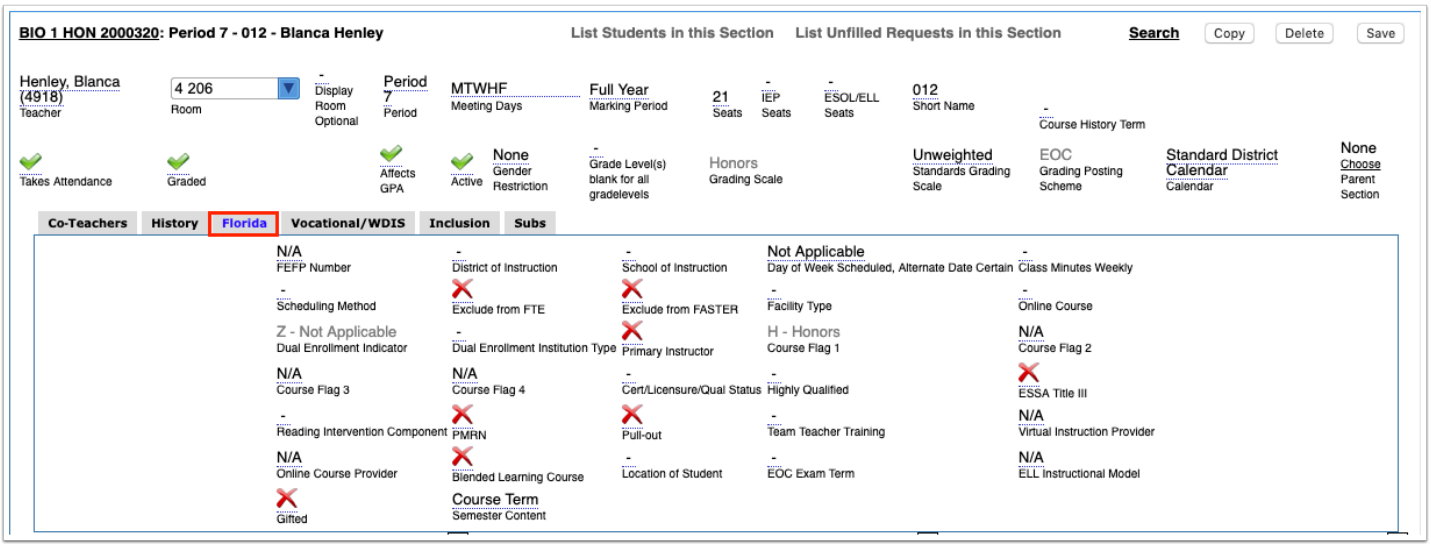
**2.** Select the **Subject**, **Course**, then **Section** to be viewed/updated. Section information will be displayed at the top of the screen.

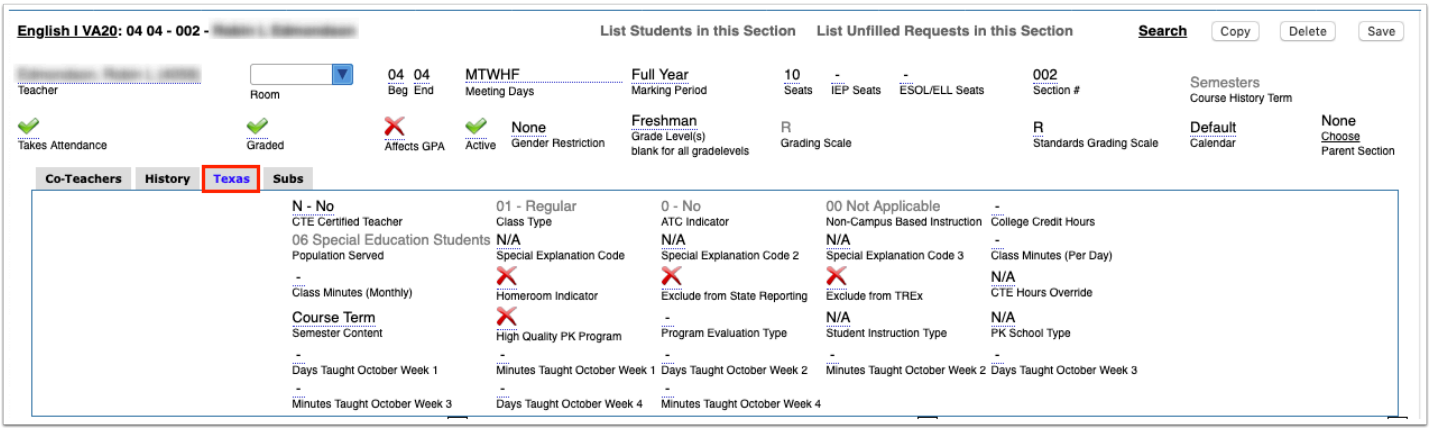



**3.** Any field with a blue underline can be edited. Any field grayed out is set in the course catalog. Make any necessary changes to these fields and click **Save**.

If changing the teacher after the school year/term has begun, a pop-up displays providing the option to log the change to the History tab or to select the Do not log history check box.

**4.** Click the state tab, such as **Florida** or **Texas** to edit any of the state-specific fields. These fields can also be edited from the Master Schedule Report.




**5.** Click **Save**.

**Class Minutes Weekly** is NOT calculated by the Length of minutes in the Period (Bell Schedule) set up. If any of the Texas fields have been set by the District at the Course Catalog level, schedulers may not be able to edit those fields. When this is true, the fields will display greyed out.

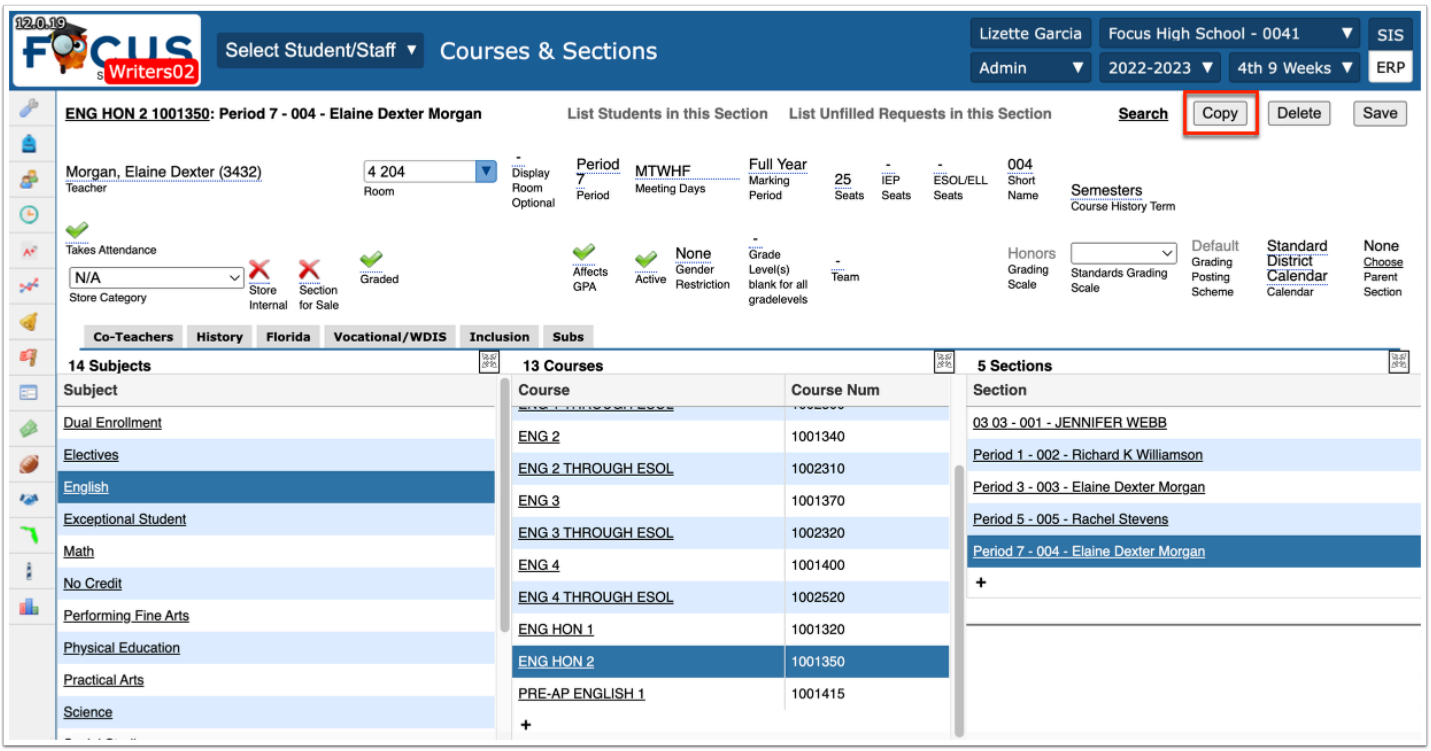
# Copying Sections

The Copy feature can be used when additional sections are needed within the same course for the same or a different teacher; this process may be faster than adding a new section, and is generally recommended over creating a new section (unless starting from scratch).

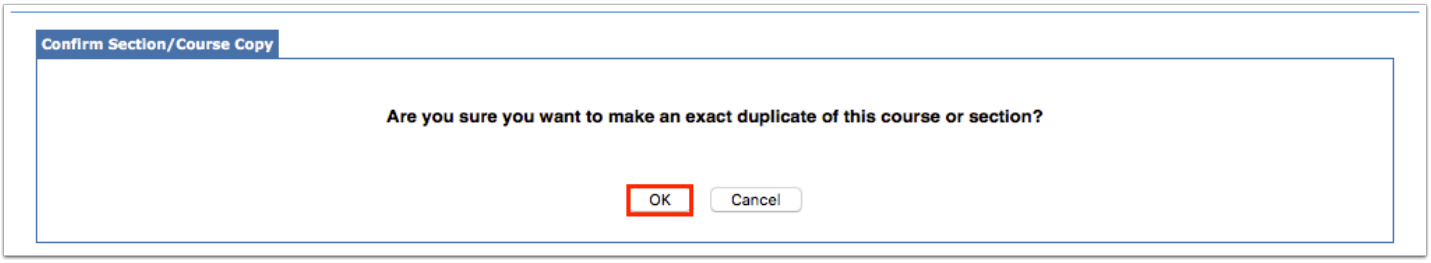
**1.** Go to the **Scheduling** menu and select **Courses & Sections**.

**2.** Select the **Subject**, **Course**, then **Section** to be copied.

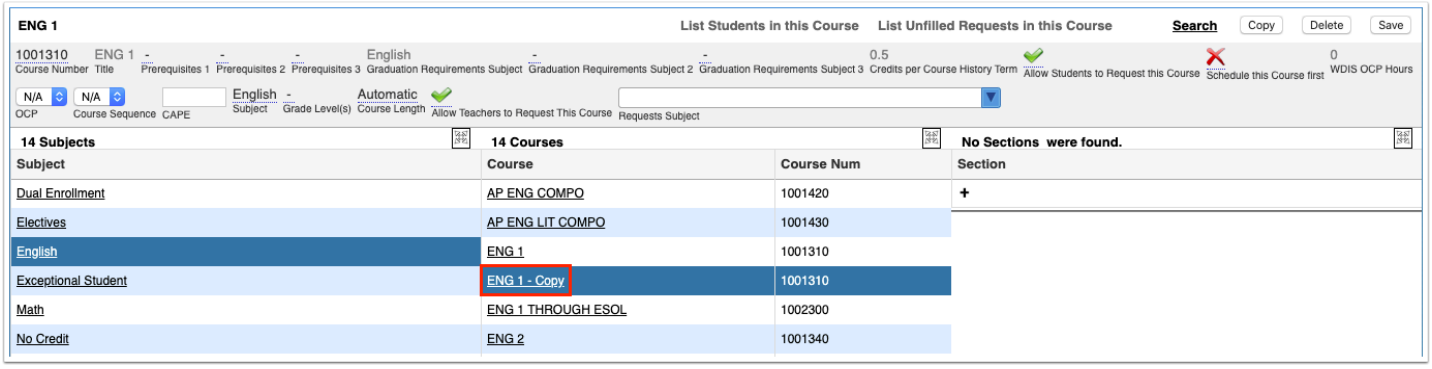
**3.** Click the **Copy** button in the upper right of the Section information.




**4.** In the confirmation message, click **OK**.




The copy of the course is created and displayed on the screen with "copy" appended to the Course name in the Course list.



**5.** Where applicable, change the Teacher, Room, Period, (Rotation Day if used), Short Name, and any other relevant fields.

**6.** Click **Save**.

> The Short Name must be unique for each section. Focus automatically assigns the smallest 3 digits available for the Short Name. Most schools/districts have a specific naming convention to identify teacher sections.

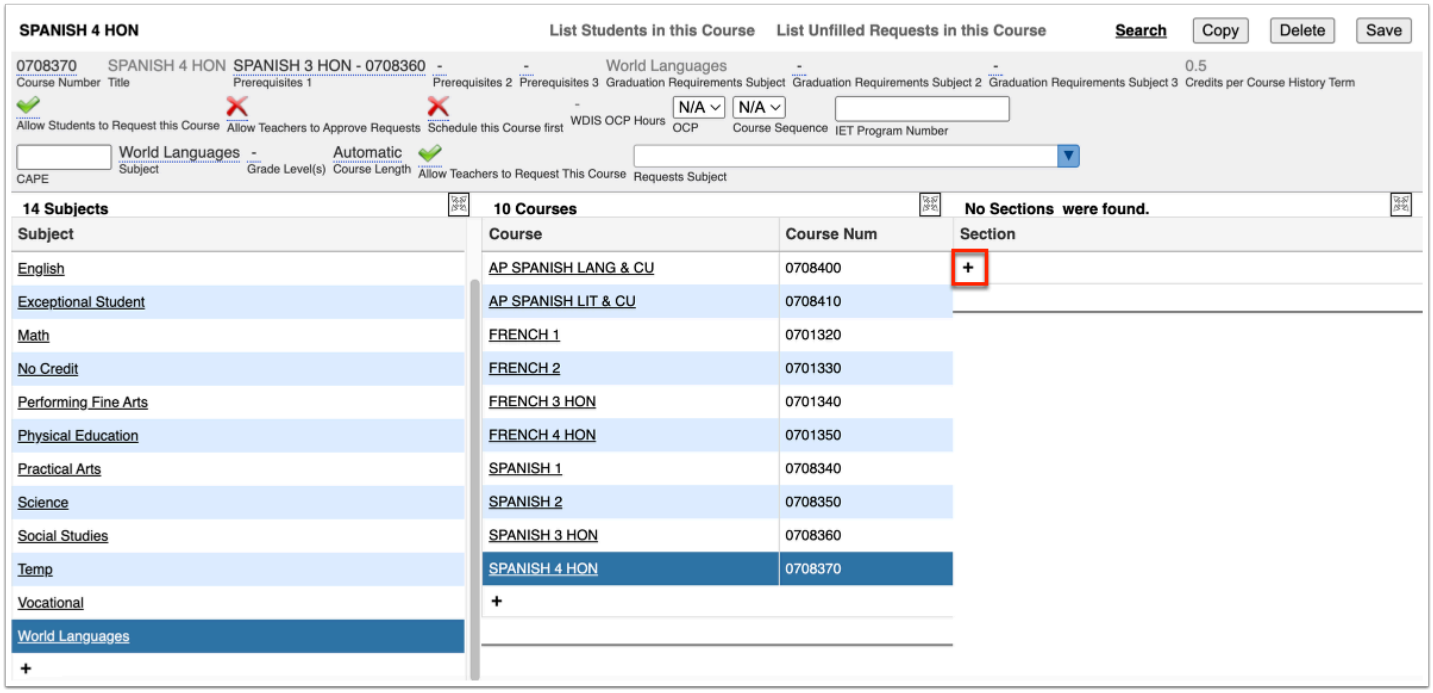
## Adding New Sections

> If no Sections exist within a Course, a new section can be created. This is where schools who have not rolled sections would begin. Sections can also be created while others already exist, if applicable.

**1.** Go to the **Scheduling** menu and select **Courses & Sections**.

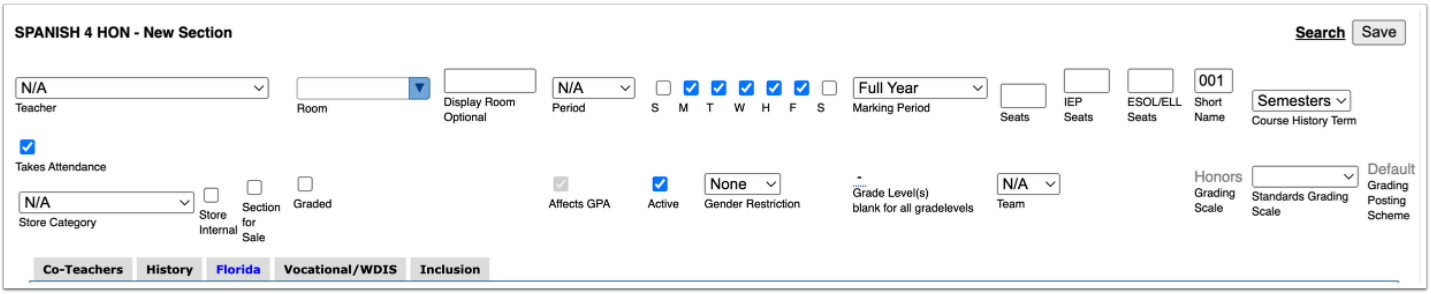
**2.** Select the **Subject** then select the **Course**.

**3.** In the **Section** column of the selected course, click the **+** (black plus sign).

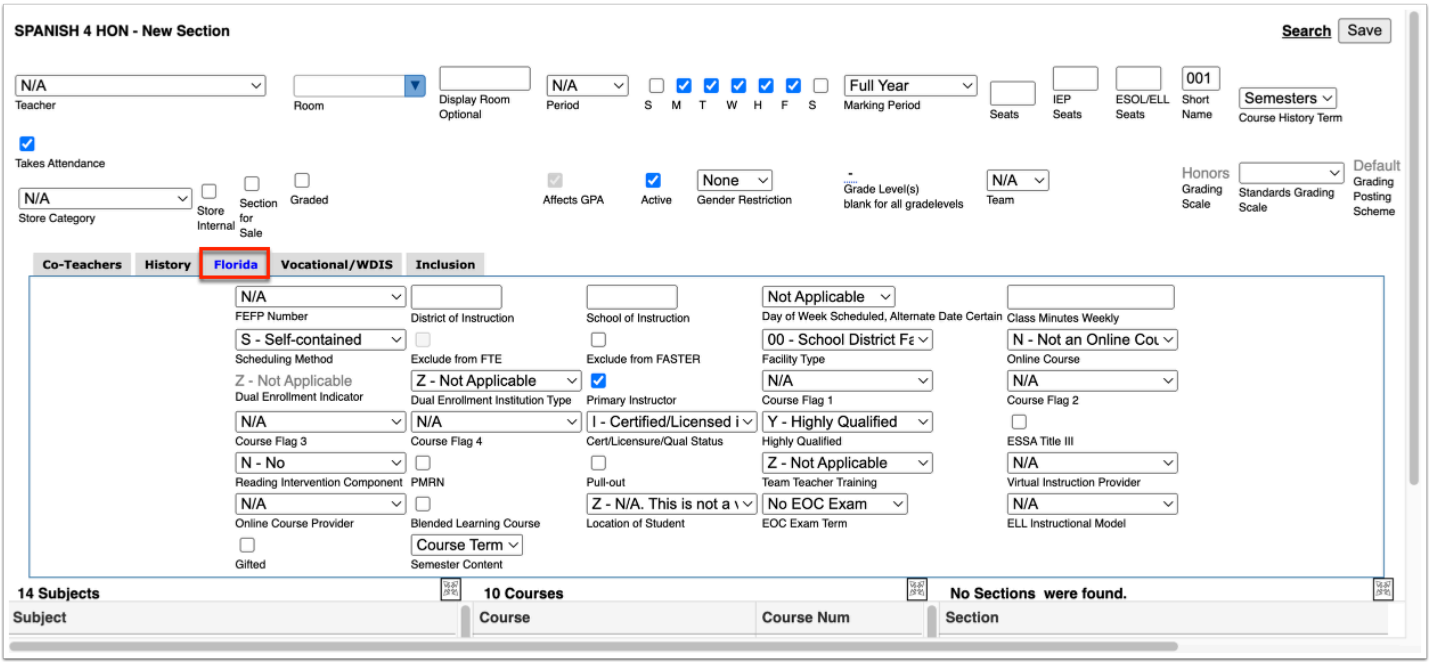



**4.** Select a Teacher, Room, Period, Rotation Day (if used), Bell schedule (only appears if multiple bell schedules exist), Meeting Day(s), Marking Period (if different from the defaulted marking period), number of Seats, Short Name, whether the section Takes Attendance, is Graded and/or

Affects GPA. Some fields may auto-fill from the Course Catalog; they will be grayed out (e.g. Grading scale, Calendar, Grade Posting Scheme, etc.).




Click the state tab, such as the **Texas** or **Florida** tab to edit any of the state-specific fields, such as the Class Weekly Minutes, Scheduling Method, & Primary Instructor. Some fields may auto-fill from the Course Catalog; they will be grayed out (e.g. FEFP Number, Dual Enrollment fields, etc.).




**5.** Click **Save**.

# Activity

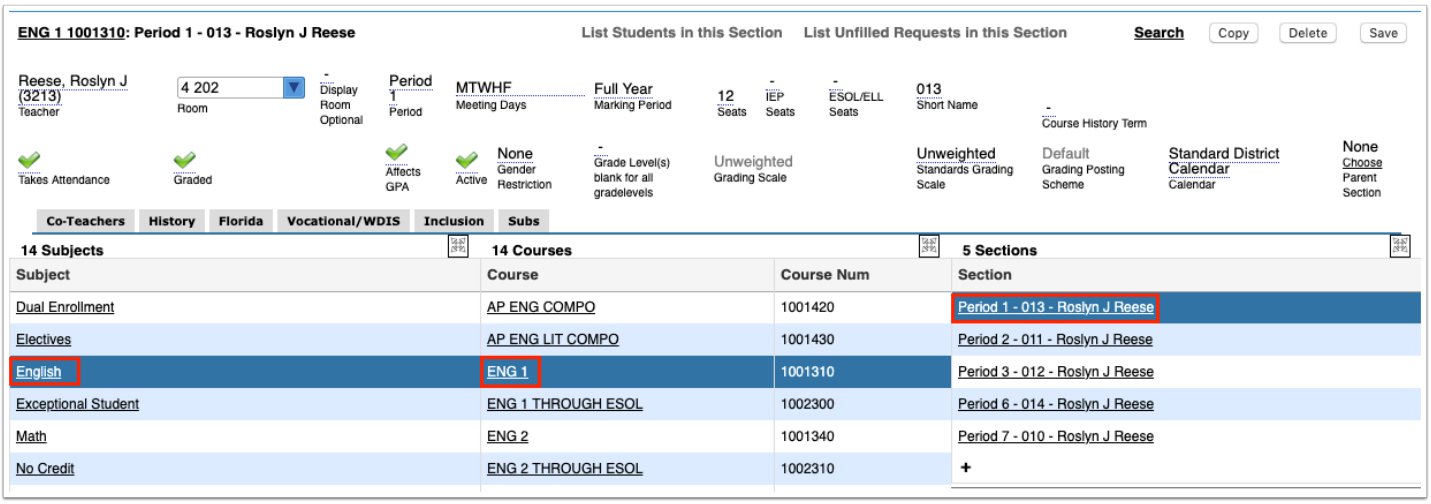
1. Copy a section.
2. Change the Teacher, Room Number, and Short Name.
3. Add a new section from scratch.
4. Don't forget to review the state fields.

# Deleting a Section

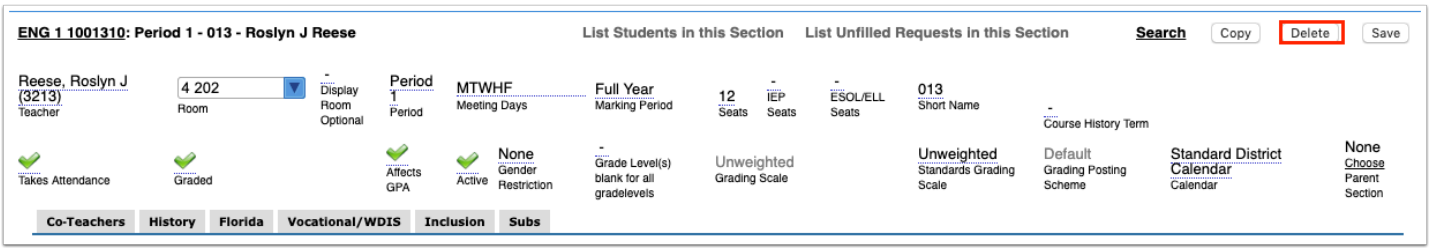
If more sections exist than are needed, some may be deleted.

**1.** Go to the **Scheduling** menu and select **Courses & Sections**.

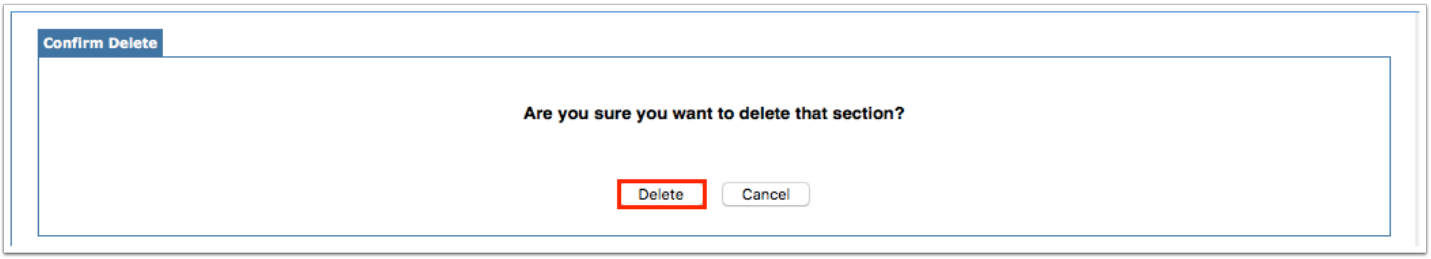
**2.** Select the **Subject**, **Course**, and then the **Section** to be deleted.




**3.** At the top of the screen, click **Delete**.




**4.** In the confirmation message, click **Delete**.



Once the term has begun, sections cannot be deleted if there are students scheduled into the section, or at any time where attendance or grades were tied to the section.

## Making Sections Inactive

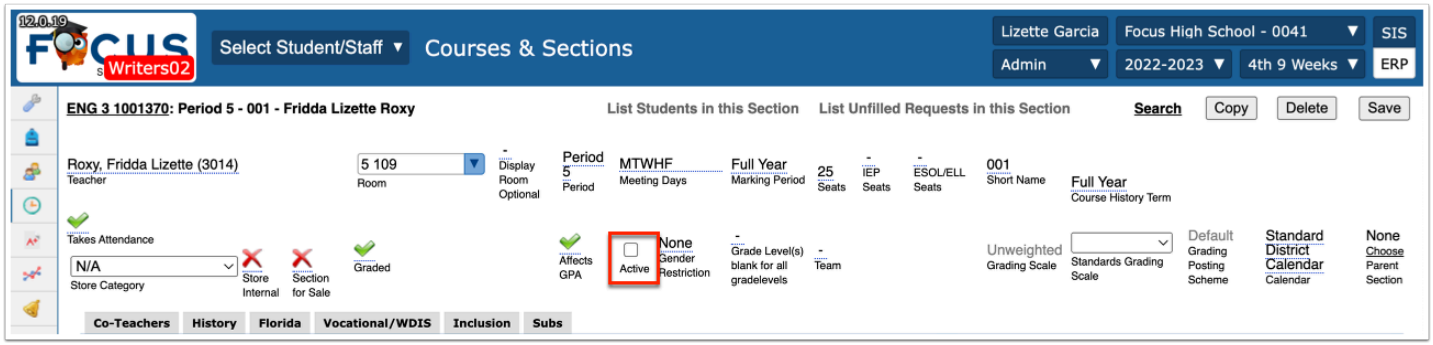
If a section will not be used but needs to be kept for reporting purposes or demand might later require its use, schedulers can mark the section Inactive, ensuring no students will be scheduled into it.

If students are already scheduled into the section, the Inactive option will not be available for that section until the students are removed.

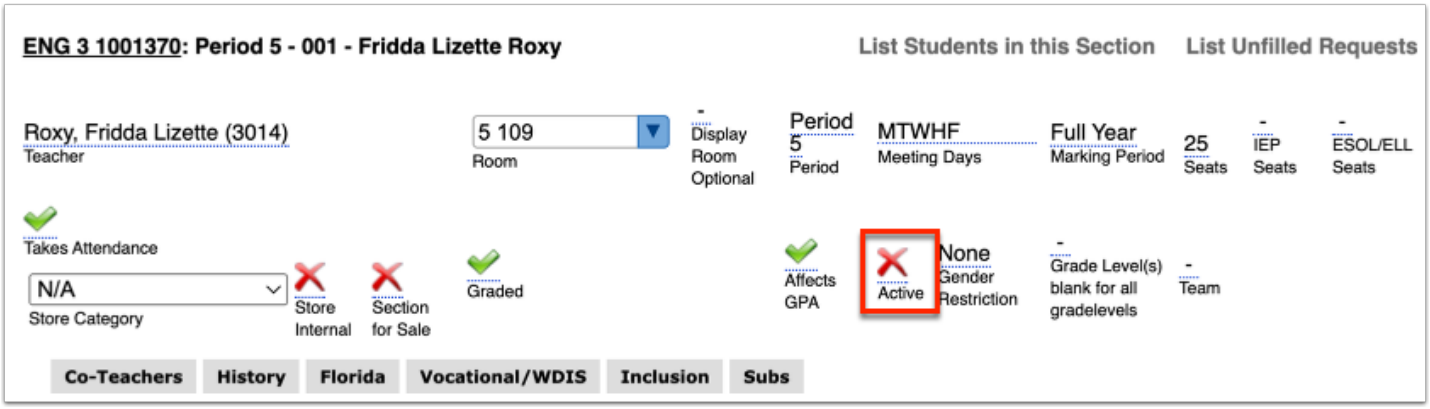
**1.** Go to the **Scheduling** menu and select **Courses & Sections**.

**2.** Select the **Subject**, **Course**, then the **Section** to be marked inactive.

**3.** Deselect the **Active** check box.




**4.** Click **Save**. A red **X** now displays.



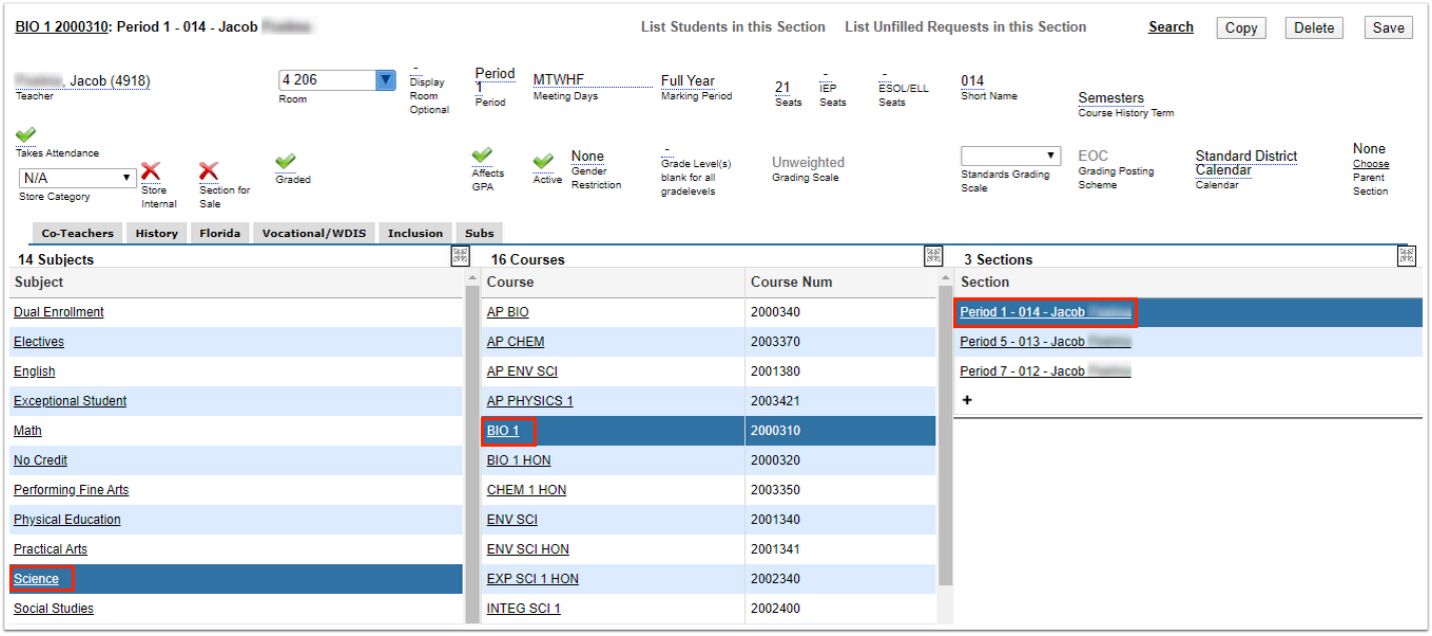

# Moving Sections

There are several scenarios when scheduling teams may want to take an existing section and move it to another course entirely:

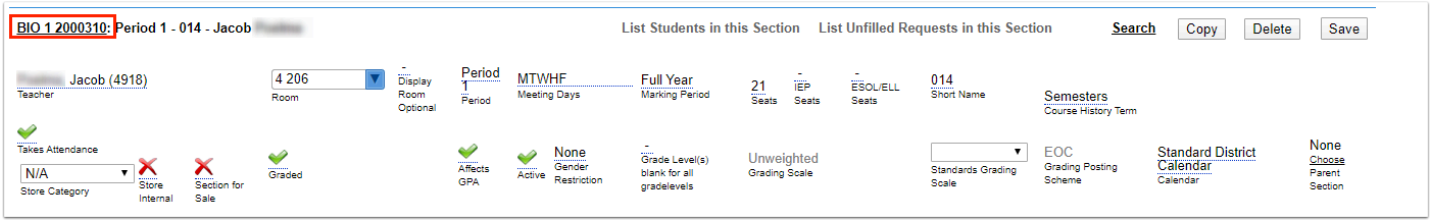
- A course has no sections at all.
- A teacher will be teaching a different course and the current section is not needed in the current course.
- A course is being dissolved but the section is needed in a different course.
- The section has been assigned to the wrong course.

**1.** Go to the **Scheduling** menu and select **Courses & Sections**.

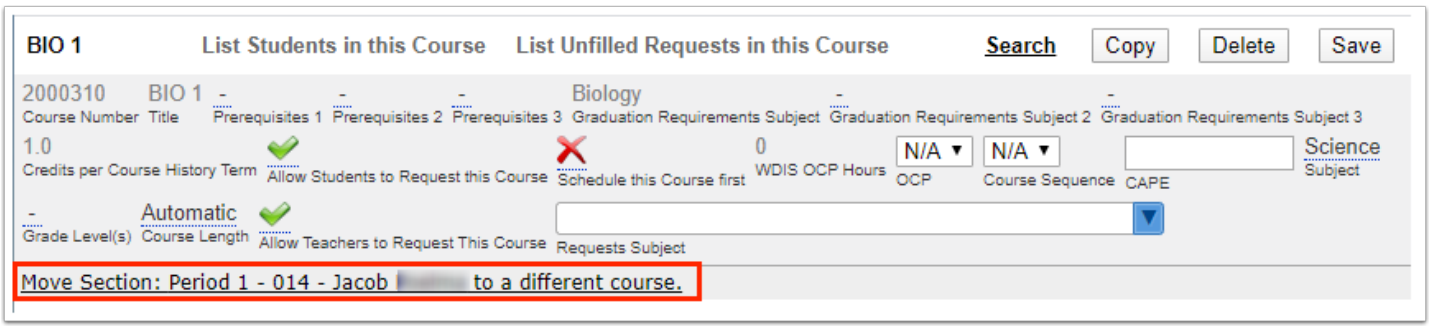
**2.** Select the **Subject**, **Course**, and the **Section** to be moved.




**3.** At the top of the screen, click the bold course link.

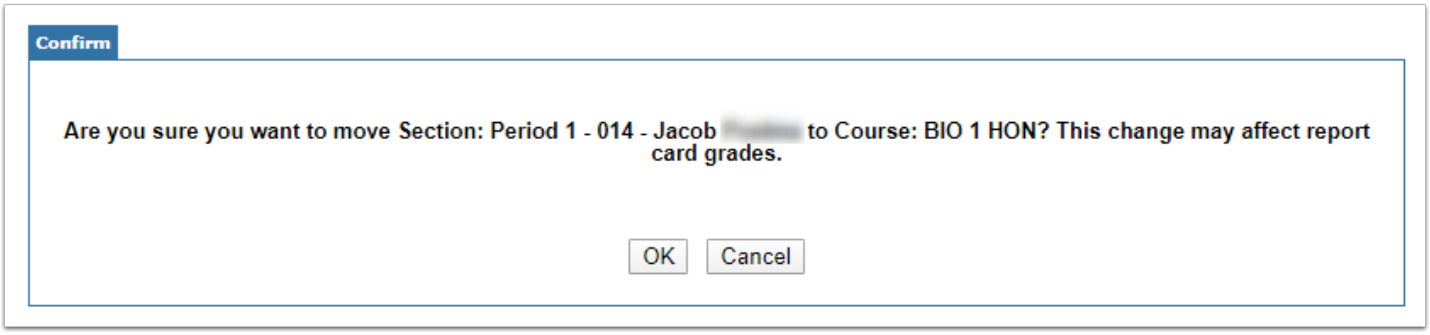



**4.** In the pop-up window, click the **Move section ___ to a different course** link.




**5.** Click the subject and course to move the section to.

**6.** In the confirmation message, click **OK**.



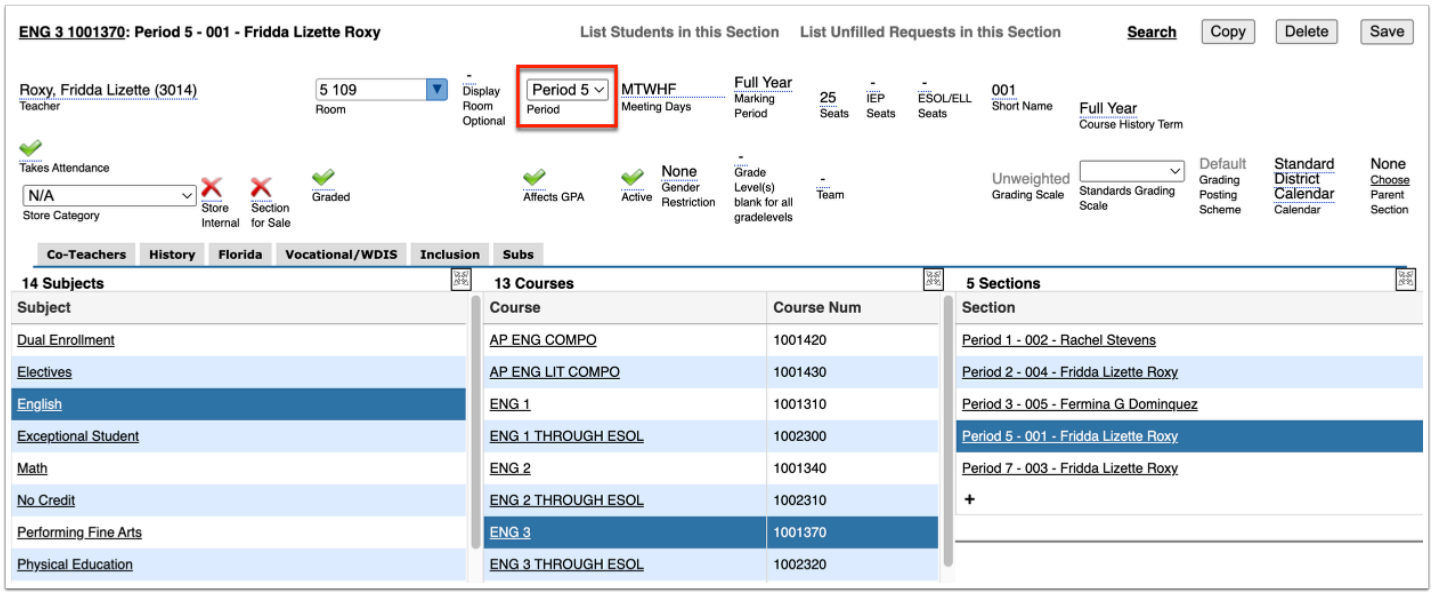

The section is moved to the selected subject and course. Any standards assigned to the previous section will be assigned to the new section.

# Changing Periods on Sections

**1.** Go to the **Scheduling** menu and select **Courses & Sections**.

**2.** Select the **Subject**, **Course**, and the **Section** that needs to have the period reassigned.

**3.** Select the new **Period**.




**4.** Click **Save**.

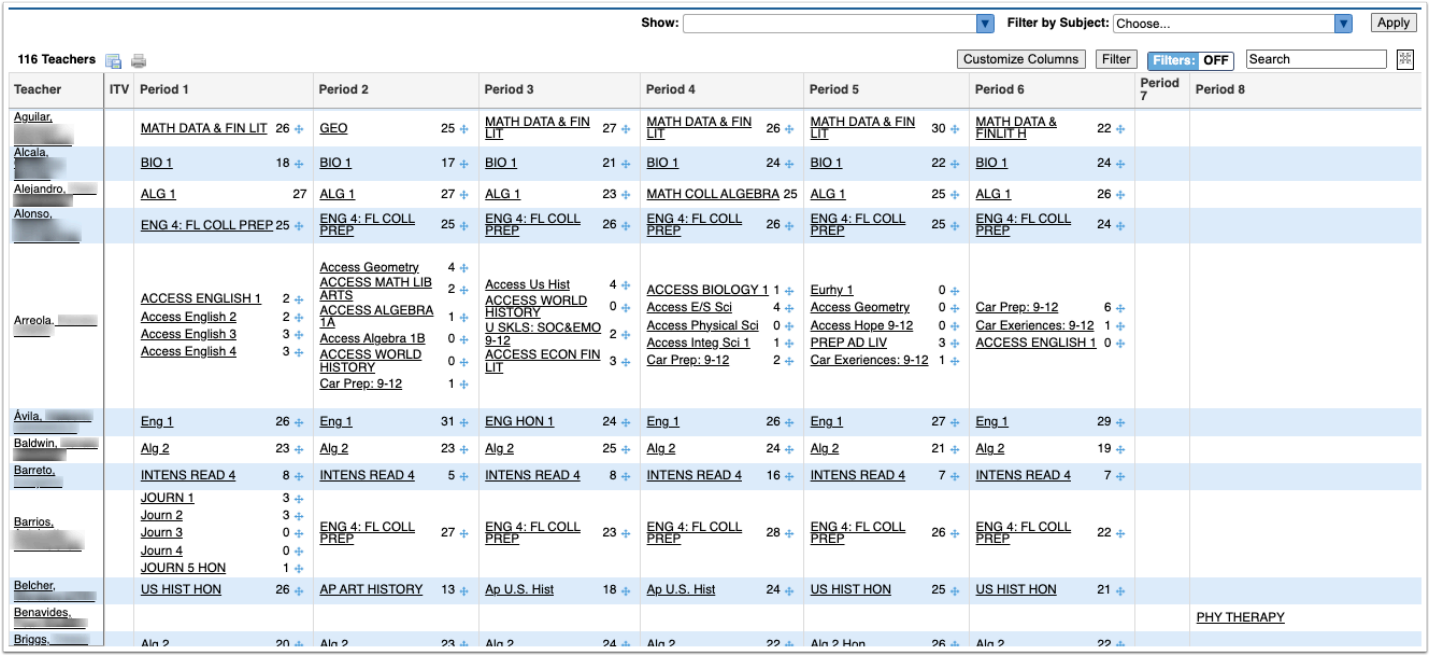
## Activity

1. Change the period of a Singleton class.
2. Change the Teacher and Room number on a section.
3. Move a section to a different course.

## Moving Sections via the Teacher Schedules Report

If Courses & Sections were rolled over from the previous year, and/or sections were added for the new year, the Teacher Schedules Report will display a list of all teachers with assigned sections provided the sections have been assigned to periods. This report can be used to make changes to a master schedule by literally dragging and dropping sections from period to period for a teacher or from teacher to teacher.

**1.** Go to the **Scheduling** menu and select **Teacher Schedules Report**.

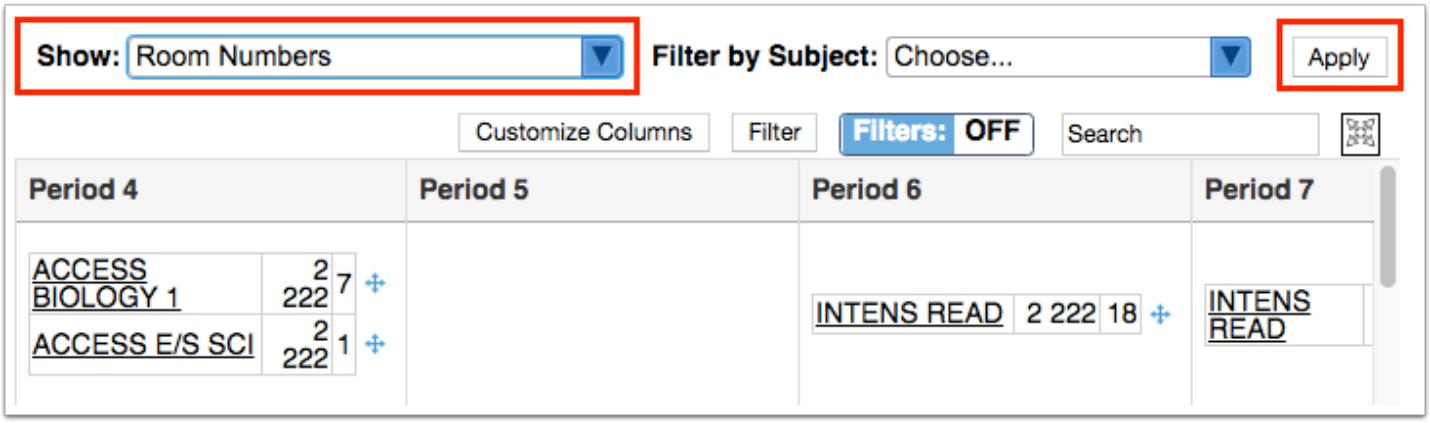



If the section is a spanned period, it will need to be moved by the beginning period.

If sections are linked, each linked section will need to be moved separately.

The drag and drop feature (blue + sign) works best with sections that are built as single periods instead of spanned periods.

**2.** Click the **Show** pull-down to display different information in the report. You can select as many items as needed. Click **Apply** to display the selected options in the report.




**a.** Select **Room Numbers** to display the room number the section is assigned on the report.

**b.** Select **Co-Teachers** to display the sections the teacher is a co-teacher for on the report.

**c.** Select **Course/Section Numbers** to display the course number and the section short name on the report.

**d.** Select **Terms** to display both Semester 1 and Semester 2 classes on the report.

If Terms is not selected to display, only classes scheduled into the term selected at the top-right corner of the screen will display on the report.

**e.** If rotation days are enabled at your school, select **Rotation Days** to view the rotation days each section meets on the report.

**f.** Select **Total number of students for the entire period** to display the total number of students for each period at the bottom of the table, based on the content displayed in the report. For example, if you have the report filtered by subject to only display English sections, the period totals will only include those English sections.

**g.** Select **Totals** to display the total number of students scheduled in each period as well as the total number of students in all of the teacher's sections (the Total Students column displays on the right side of the report).

**h.** Select **Highlight on Double Scheduled** to highlight periods that have more than once section scheduled for a teacher in red.

**i.** Select **All Teacher Sections (when filtered by subject)** to display all of a teacher's sections when filtering the report by subject.

For example, when "Exceptional Student" is selected in the Filter by Subject pull-down, all of the Exceptional Student sections display on the report. Selecting "All Teacher Sections (when filtered by subject)" and applying it to the report displays the additional sections for those teachers that are not Exceptional Student sections.

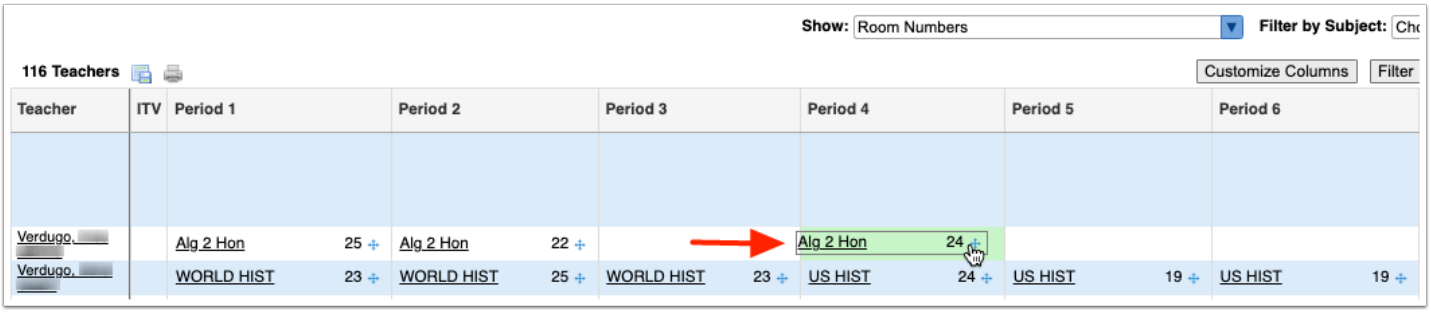
**j.** Select **Limit to Singletons** to display all of the sections that are singletons (only one section of the course is offered).

**k.** Select **Limit to Doubletons** to display all of the sections that are doubletons (only two sections of the course are offered).

The options selected from the **Show** pull-down are remembered and pre-loaded when you return to the Teacher Schedules Report screen.

## Moving Sections

Click the blue cross next to the section and drag the section to a different period or teacher.

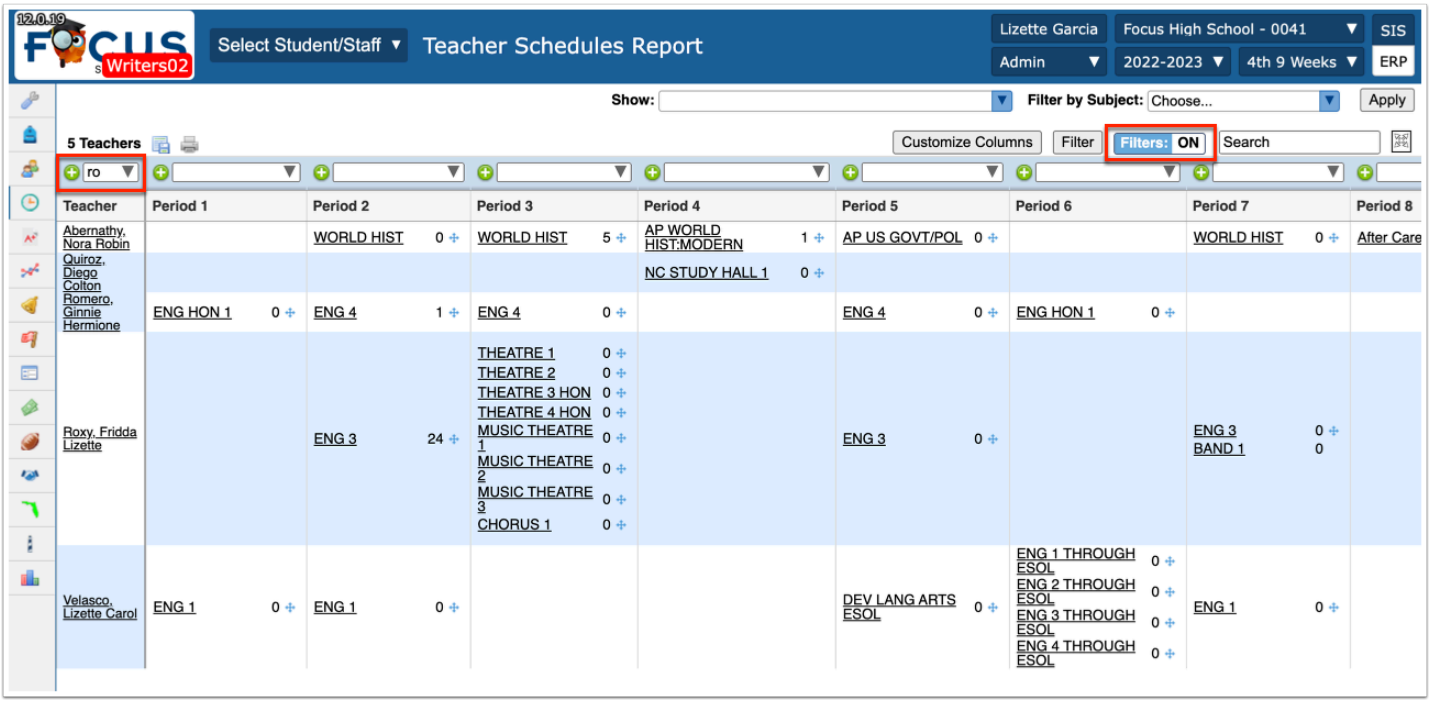


## Filtering for Teachers Before Moving Sections

When moving sections from one teacher to another, filters can be used to display only those teachers that are switching classes.

**1.** Click **Filters**: **ON**.

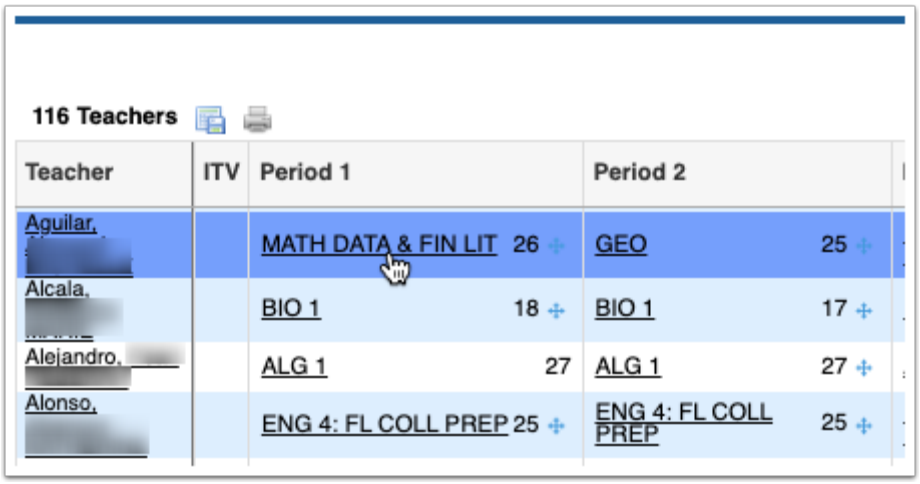
**2.** In the **Teacher** column, type in a Teacher name in the provided filter text box.




**3.** Click the green plus sign (+) to add another filter to filter by more than one teacher.

If a section is moved, change the Short Name and Room Number as needed. If a section is moved to a different period or teacher after running the Scheduler, the Scheduler will need to be run again in order to properly re-distribute the students.

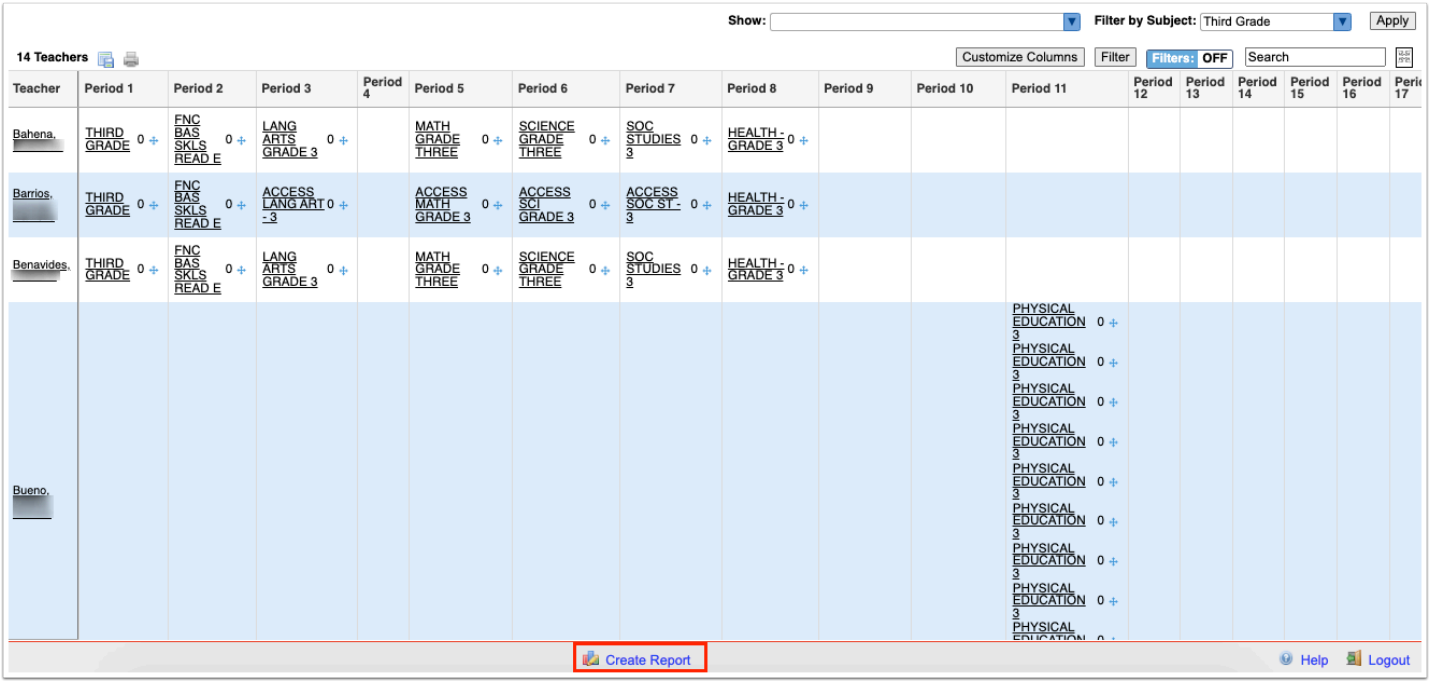
**4.** Click on a section to view the section information in the Courses & Sections screen, opened in a new tab. Edits can be made to the section information as needed.



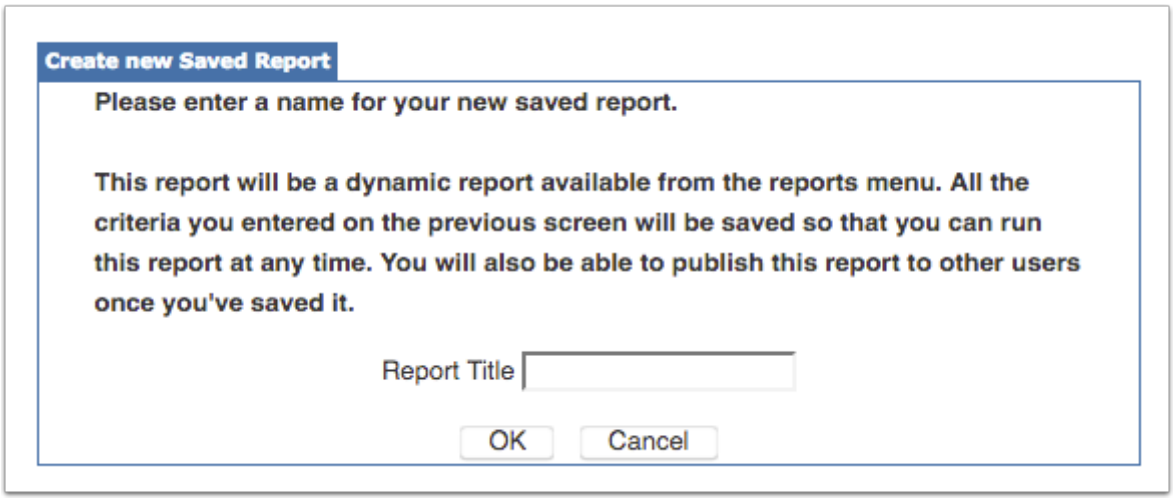

## Creating Reports from the Teacher Schedules Report

The Teacher Schedules Report can be saved with the filters and parameters you have set so that the report can be run again at a later time with these settings intact. The saved report is available in the Reports menu under My Reports and in Reports > Saved Reports.

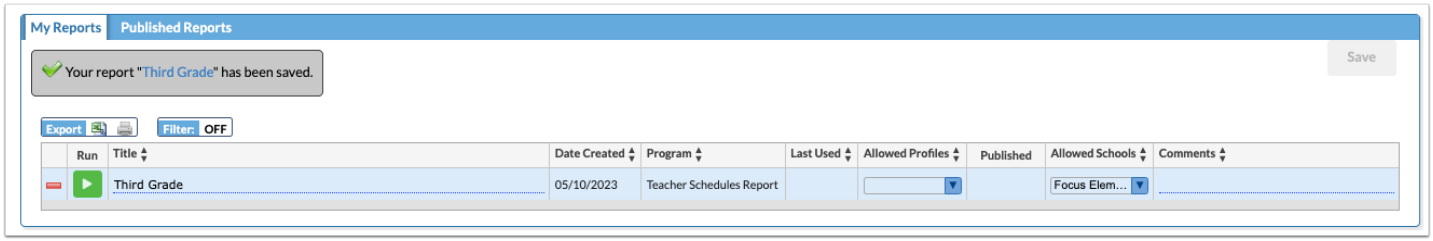
**1.** At the bottom of the screen, click **Create Report**.




**2.** Enter the **Report Title** and click **OK**.




The Saved Reports screen is displayed, with the report displayed in the My Reports list. From here, you can run the report, edit the report title, select profiles and schools to share the report with, and delete the report.




## Activity

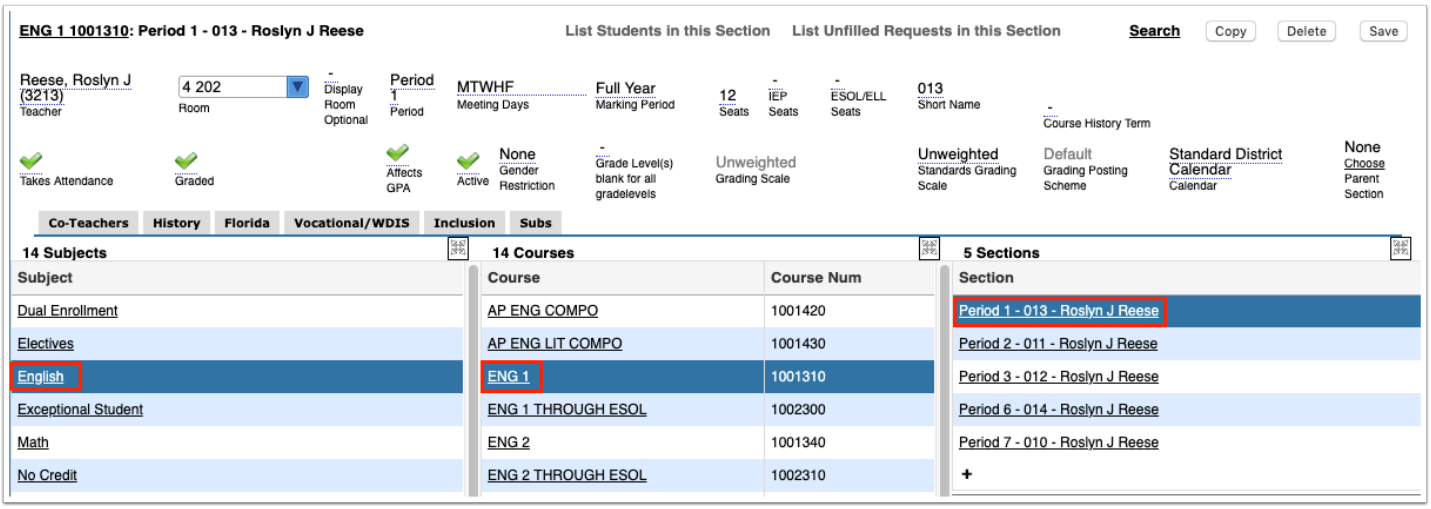
1. Use the filters to view a specific group of teachers.
2. Create a Report.

# Building Co-Taught Sections

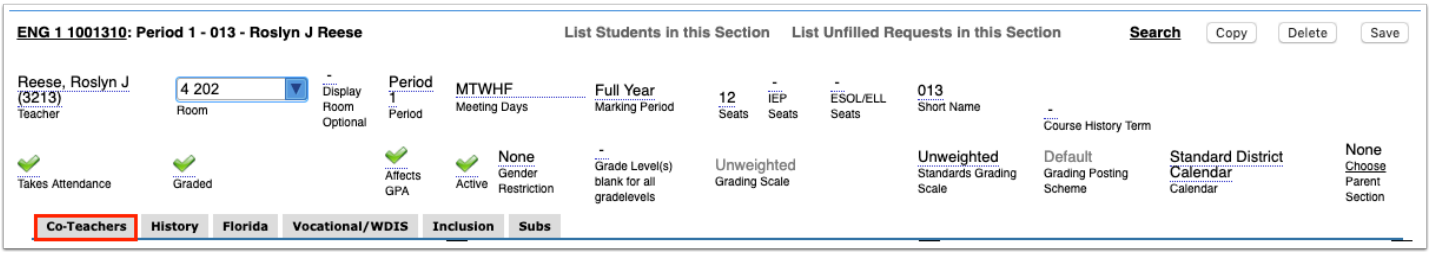
There are many scenarios where a co-teacher may be assigned to a section of a course. The Co-teacher tab on the Section allows for up to 9 different teachers to be assigned as a co-teacher.

**1.** Go to the **Scheduling** menu and select **Courses & Sections**.

**2.** Select the **Subject**, **Course**, and specific **Section** to which the co-teacher will be assigned.




**3.** Click the **Co-Teachers** tab.




**4.** In the first empty row, complete the co-teacher fields as needed:

**a.** Co-Teacher: Select the co-teacher from the list of active teachers at the school.

**b.** Permissions: Select the level of permissions to give to the co-teacher for attendance and the Gradebook. Select None, Read Only, or Modify.

**c.** Scheduling Method: Select the Scheduling Method used. If the co-teacher is an official co-teacher as designated by the state, select C - Co-teaching.

**d.** Highly Qualified: Setting this field is no longer needed.

**e.** Team Teacher Training: Select the team teacher training status. If the co-teacher is state reportable, then an option needs to be selected. *Note: For Florida, at least one teacher (regular or co-teacher) needs 3 or more years of teaching experience.*

**f.** Cert/Licensure/Qual Status: Select the co-teacher's certification status.

**g.** Primary Instructor: Select this check box if the co-teacher is the primary instructor for the section.

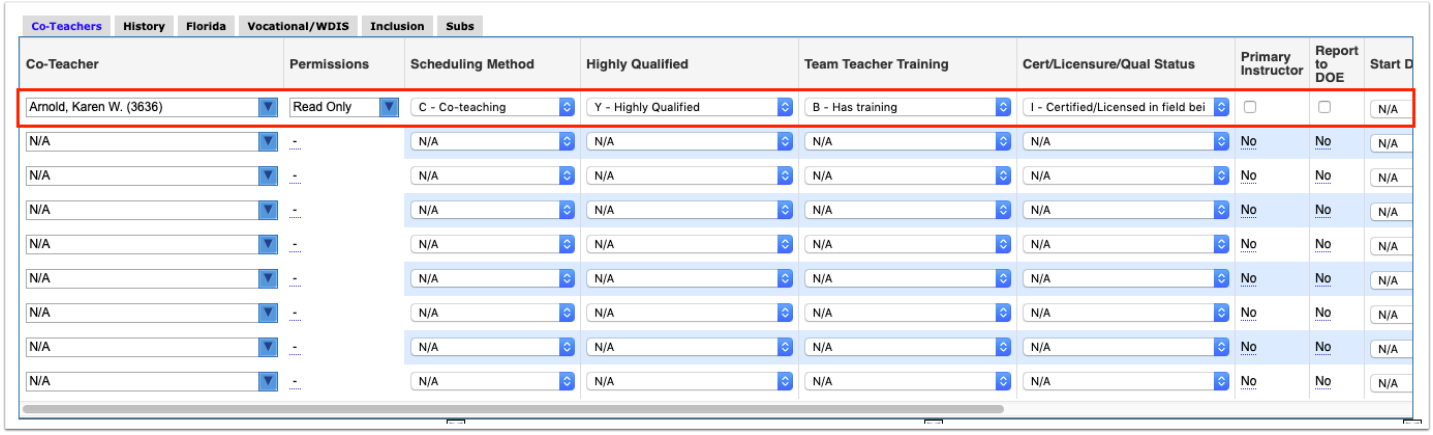
**h.** Report to DOE: Select this check box if the co-teacher should be submitted on the Teacher Course format for state reporting.

**i.** Start Date, End Date: Select the start date and end date for when the co-teacher will work with the section.

**j.** Start Time, End Time (Post-Secondary): For Post-Secondary sections, enter the start time and end time for when the co-teacher will work with the section.

**k.** Days Override: Select the days the co-teacher will work with the section.

**5.** When finished, click **Save**.

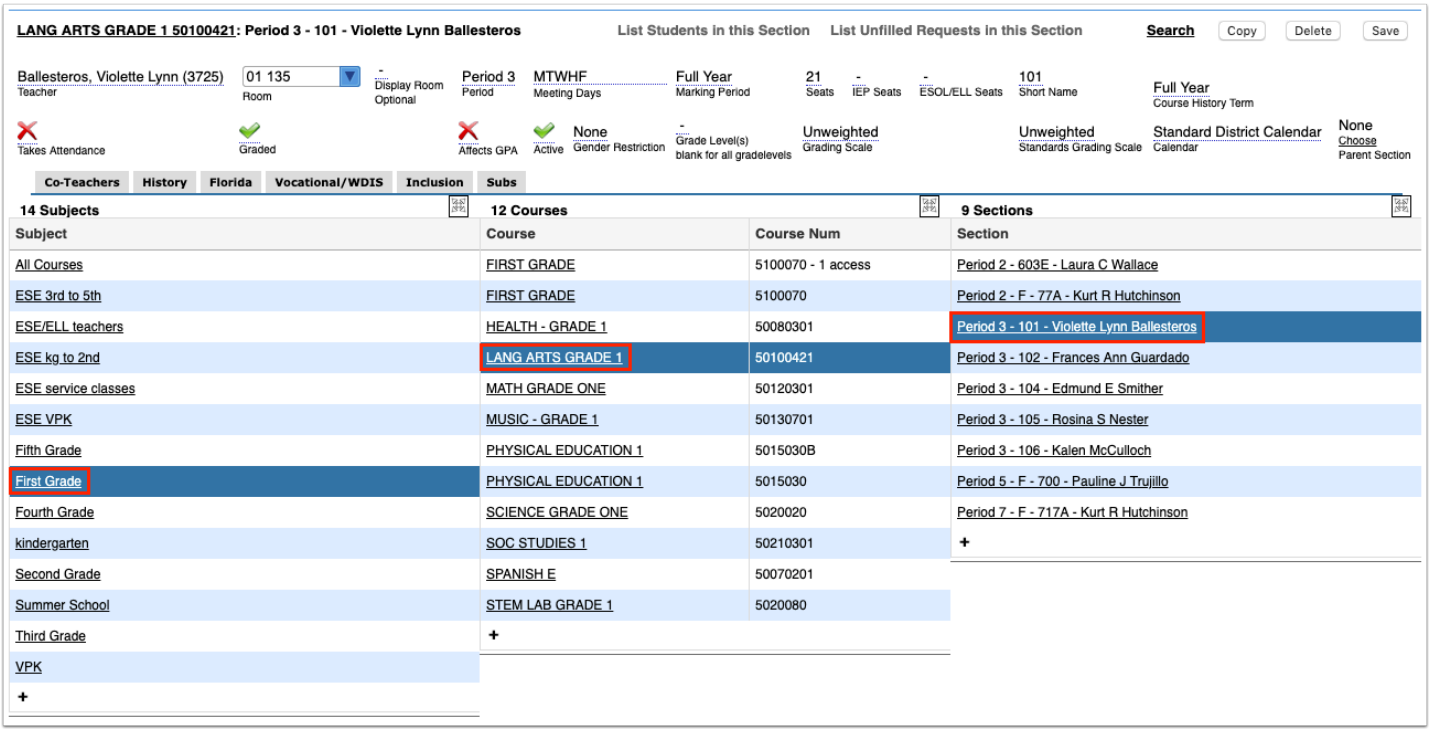



# Packaging

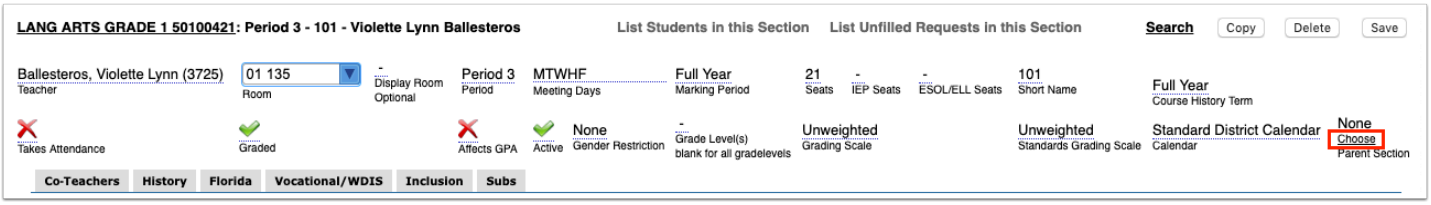
## Packaging Sections

Sections are packaged for the purpose of linking the sections together for scheduling. This is most often used in elementary scheduling when sections for language arts, math, science, art, music, etc. are packaged together with the homeroom section as the parent section. When scheduling students, students scheduled into the parent section will automatically be scheduled into the linked child sections.

**1.** Click the subject, course, and the child section.



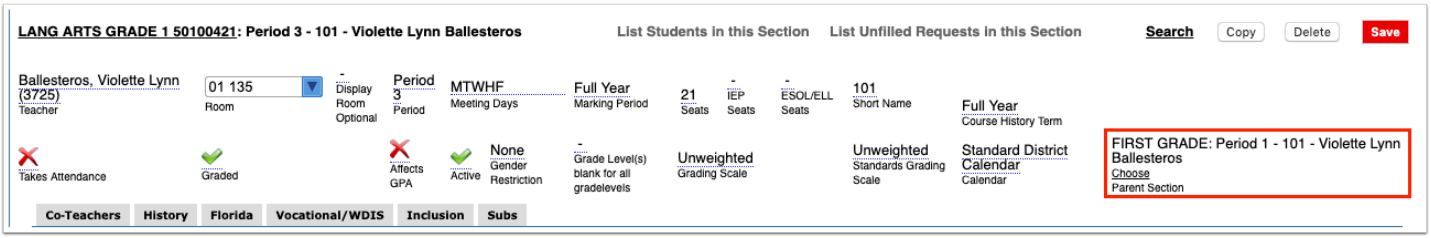

**2.** Click the **Choose** link in the **Parent Section** field.




**3.** In the pop-up window, click the subject, course, and the parent section.

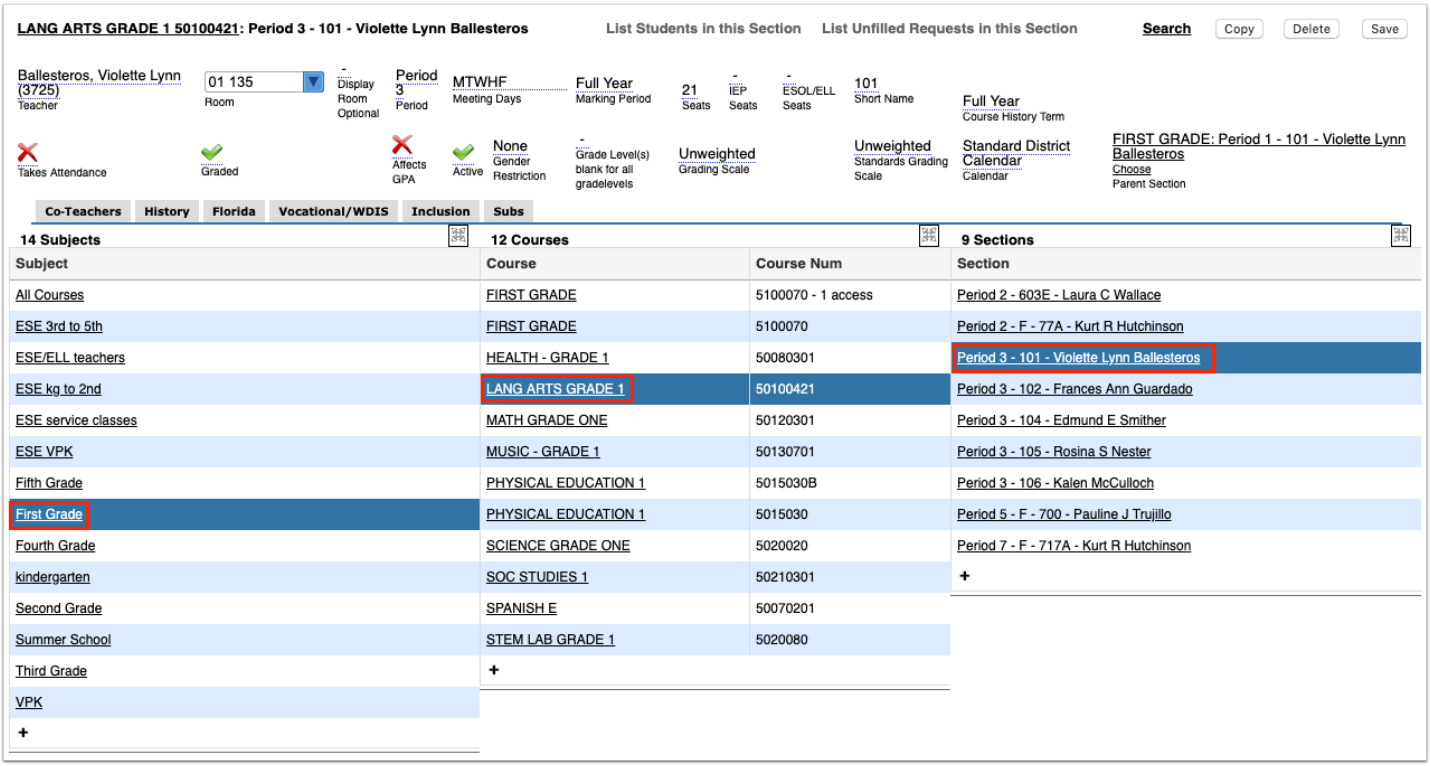
The selected section will display in the Parent Section field.

**4.** Click **Save**. Repeat this process for the other child sections that will be linked to the parent section.



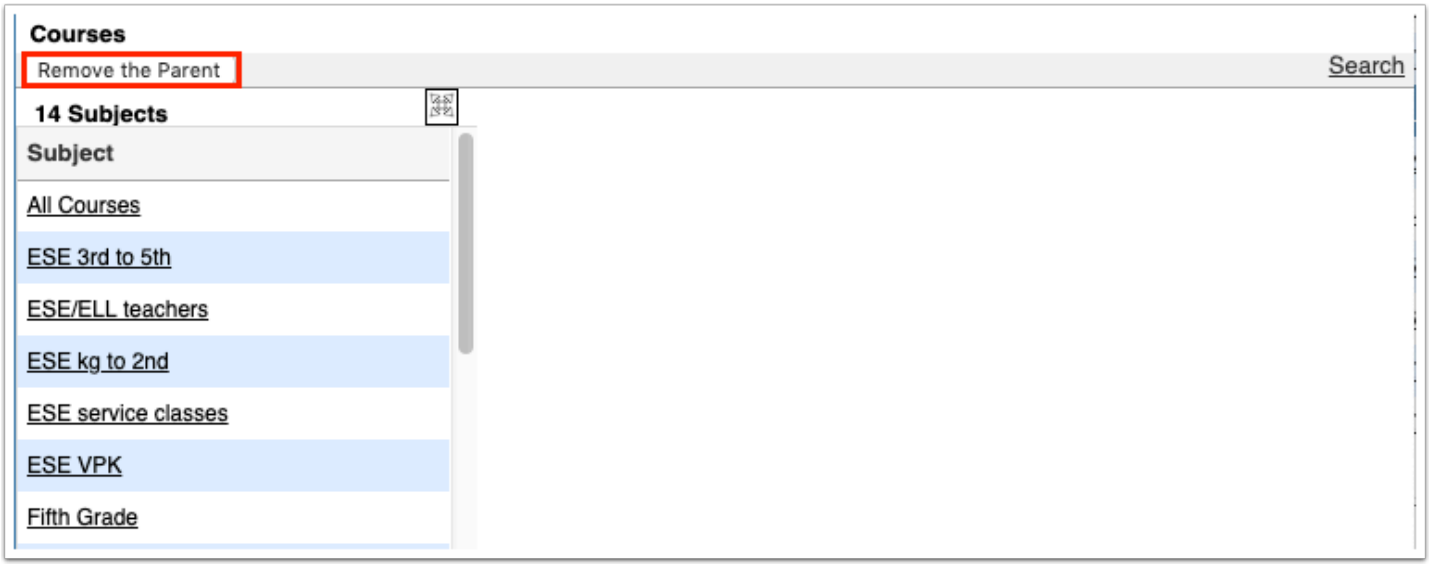

# Removing Sections from Packages

**1.** Click the subject, course, and section.




**2.** Click the **Choose Link** in the **Parent Section** field.

**3.** In the pop-up window, click **Remove the Parent.**




The section is removed from the package and the parent section will no longer display in the Parent Section field.

**4.** Click **Save**.

## Activity

1. Link 2 sections of your choice using Option 1.
2. Link 2 different sections using Option 2.

# Master Schedule Report

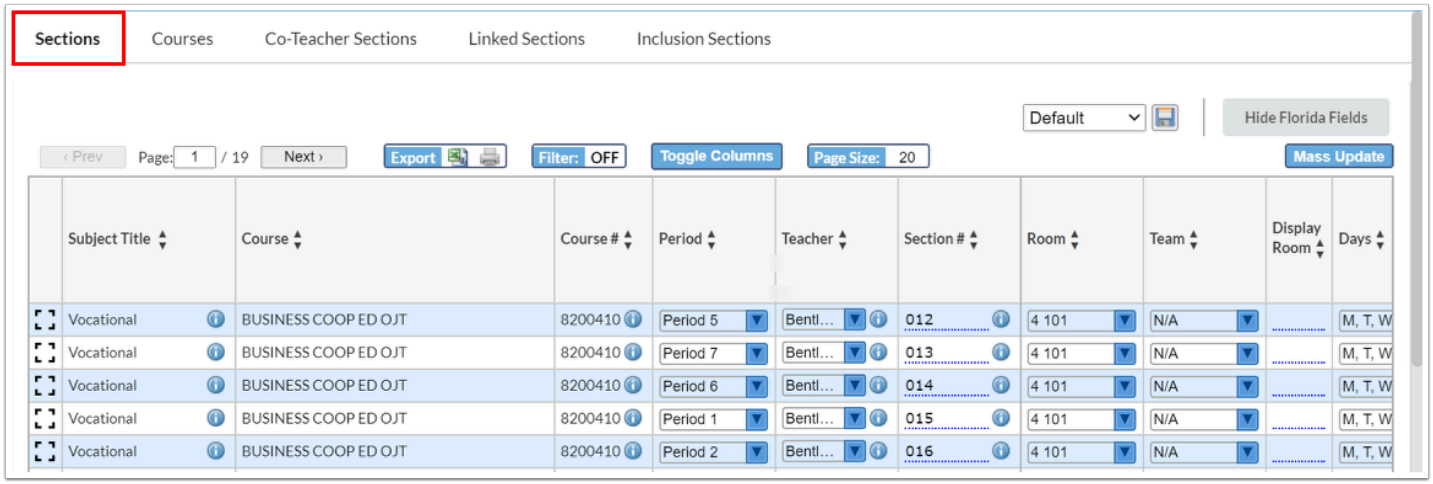
This report serves as an overview of Sections, Courses, Co-Teacher Sections, and Linked Sections. This report can be helpful for cleaning up sections and verifying all required fields have values prior to running the Scheduler. Tweaks to sections can be made directly from within the Master Schedule Report, such as Teacher and Period changes.

# Viewing the Sections Tab

The Sections tab displays section information for the sections set up at your school. Changes to the section information can be made directly on the report.

**1.** Click the **Sections** tab if not already opened.

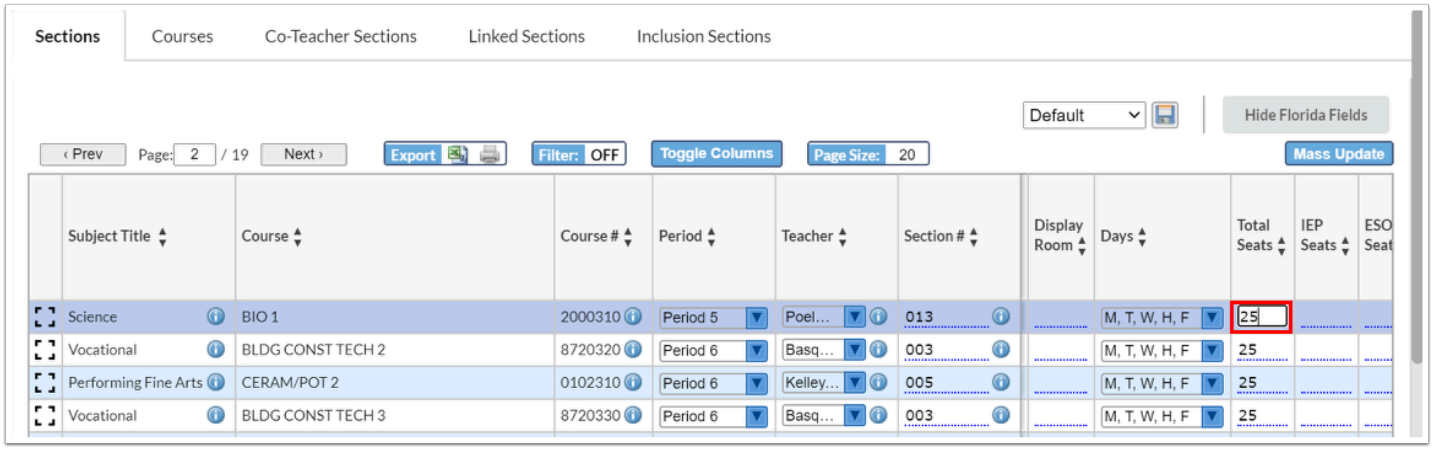
All the sections set up at the school are listed, along with all the section fields.




**2.** Click the ***i*** icon next to the Subject Title, Course #, or Section # to to open the subject, course, or subject information in Courses & Sections in a new tab or window.

**3.** Click the ***i*** icon next to the Teacher to open the teacher's user record in a new tab or window.

**4.** Make any edits to the sections fields as needed.



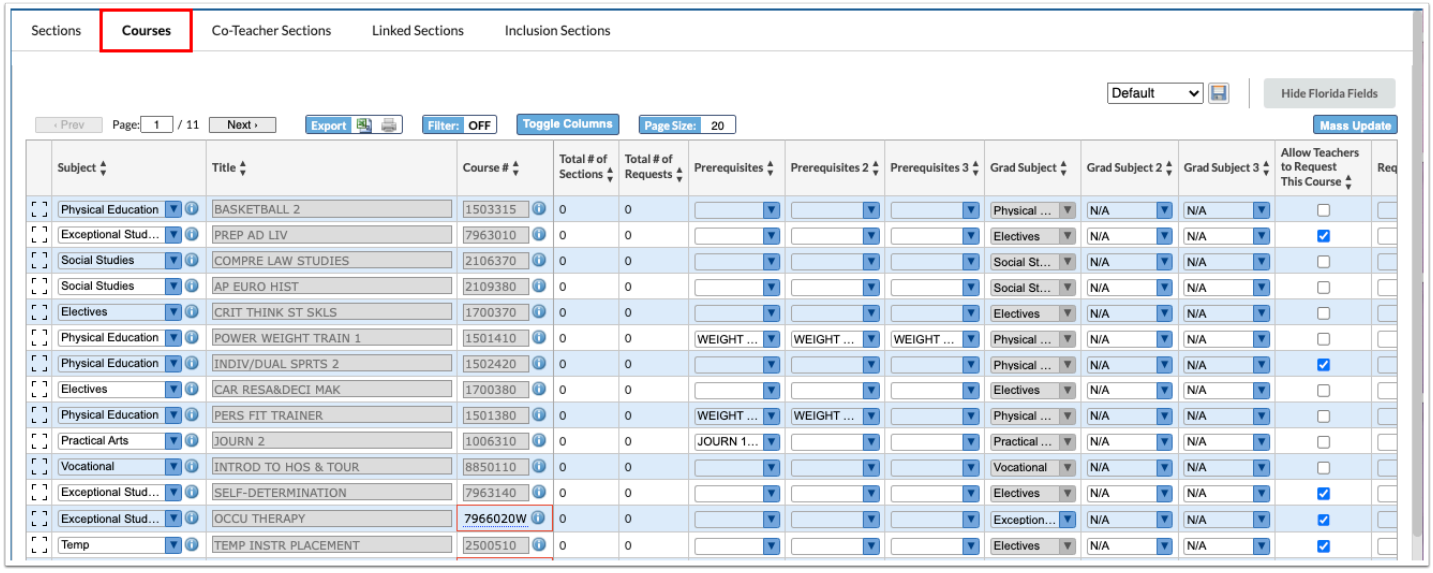

The changes are auto-saved.

# Viewing the Courses Tab

The Courses tab displays course information for the courses set up at your school. Changes to the course information can be made directly on the report.

**1.** Click the **Courses** tab.

All the courses set up at the school are listed, along with all the course fields.




**2.** Click the ***i*** icon next to the Subject or Course # to open the subject or course information in Courses & Sections in a new tab or window.

**3.** Make any edits to the course fields as needed.

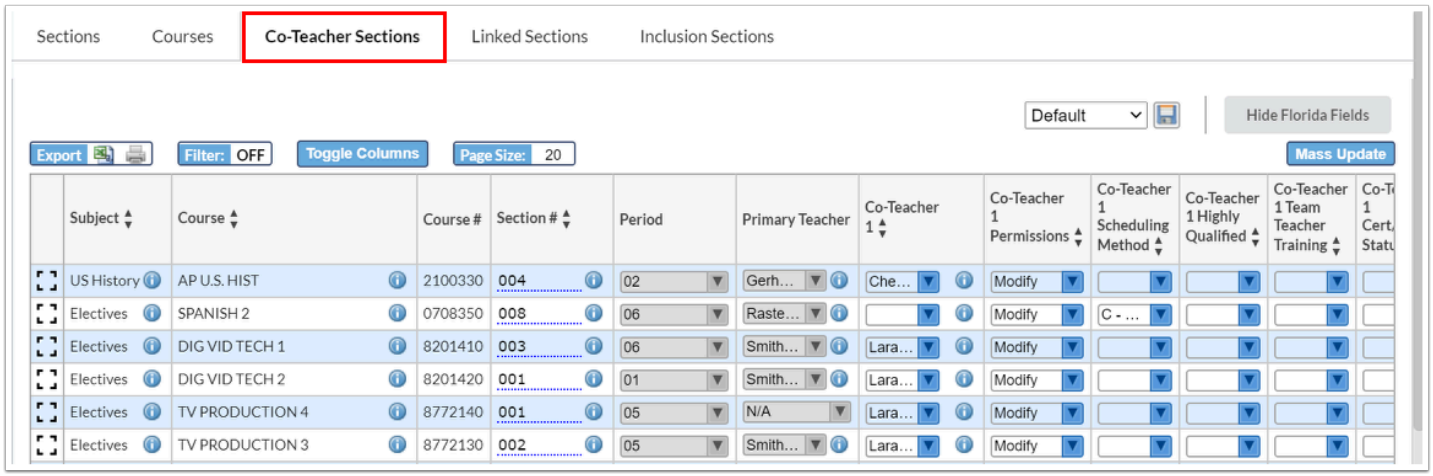
The changes are auto-saved.

Setting up Prerequisites, Allow Students to Request a course, and setting Grade Levels for a course are all fields that can be Mass Updated easily from the Courses tab on this report.

## Viewing the Co-Teacher Sections Tab

The Co-Teacher Sections tab displays any sections that have co-teachers. Changes to the co-teacher fields can be made directly on the report.

**1.** Click the **Co-Teacher Sections** tab.

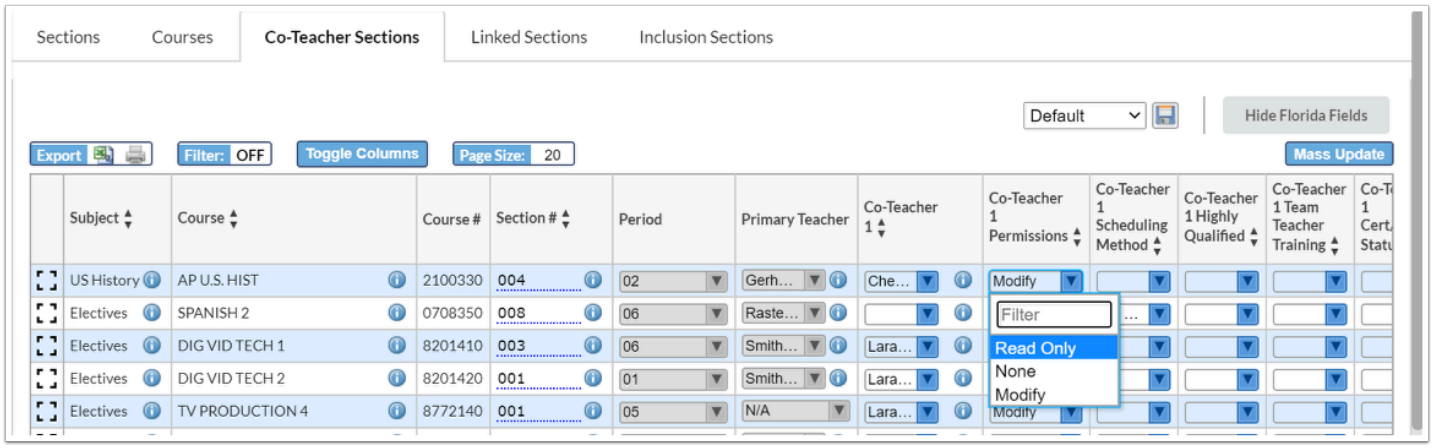



Any sections that have co-teachers defined in the Co-Teachers tab in Courses & Sections are listed, along with all the co-teacher fields.

**2.** Click the ***i*** icon next to the Subject, Course, or Section # to open the course or section information in Courses & Sections in a new tab or window.

**3.** Click the ***i*** icon next to the Primary Teacher or Co-Teacher fields to open the teacher's user record in a new tab or window.

**4.** Make any edits to the co-teacher fields as needed.



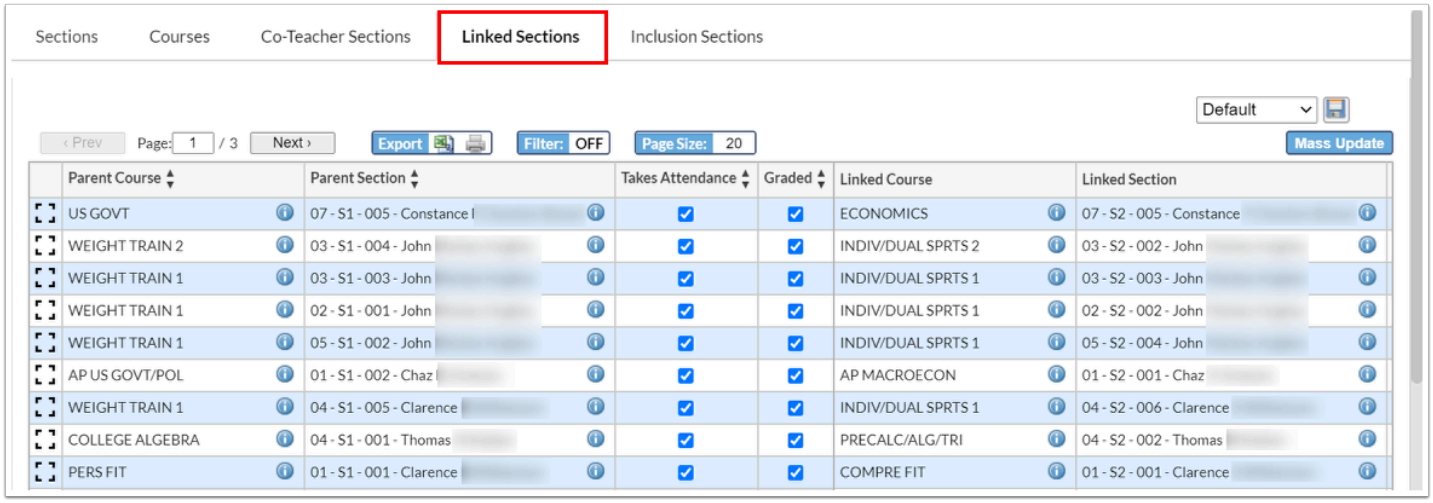

The changes are auto-saved.

## Viewing the Linked Sections Tab

The Linked Sections tab displays any parent/child sections that are set up at the school, such as elementary school homeroom sections that are linked to academic courses and specials, or secondary sections that are linked together like Economics and Government. Only the Take Attendance and Graded fields can be edited on the parent section or linked section on the report.

**1.** Click the **Linked Sections** tab.

Any parent/child linked sections set up at the school are displayed.




**2.** Click the ***i*** icon next to the Parent Course, Parent Section, Linked Course, or Linked Section to open the course or section information in Courses & Sections in a new tab or window.

**3.** Make edits to the **Takes Attendance** or **Graded** fields for the parent section or linked sections as needed.

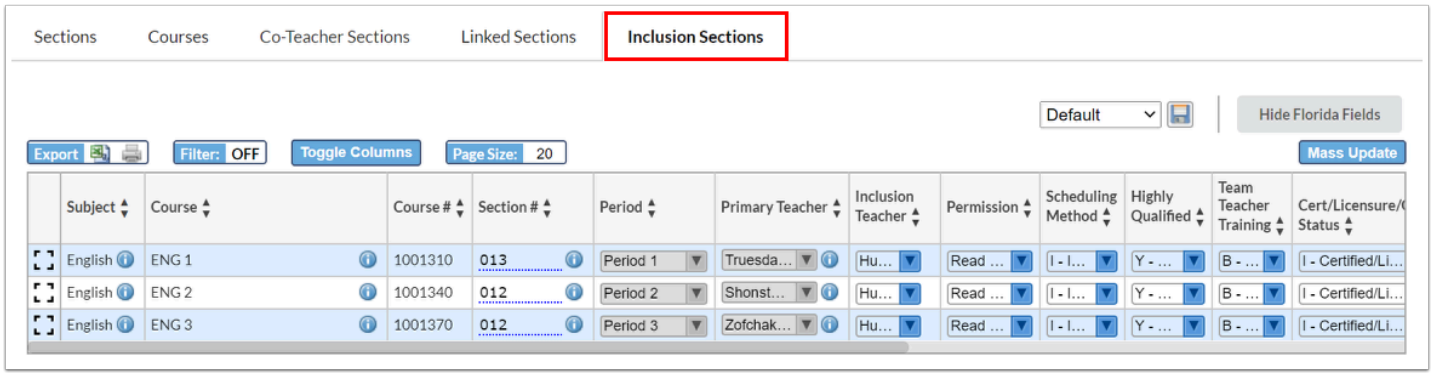
The changes are auto-saved.

## Viewing the Inclusion Sections Tab

The Inclusion Sections tab displays any inclusion sections set up at the school with the setup fields from the Inclusion tab in Courses & Sections. Changes to editable fields can be made directly on the report.

**1.** Click the **Inclusion Sections** tab.

Any inclusion sections set up at the school are displayed.




**2.** Click the ***i*** icon next to the Subject, Course, or Section # to open the subject, course, or section information for the primary section in Courses & Sections in a new tab or window.

**3.** Click the ***i*** icon next to the Primary Teacher to open the teacher's user record in a new tab or window.

**4.** Make edits to any of the inclusion section fields as needed.

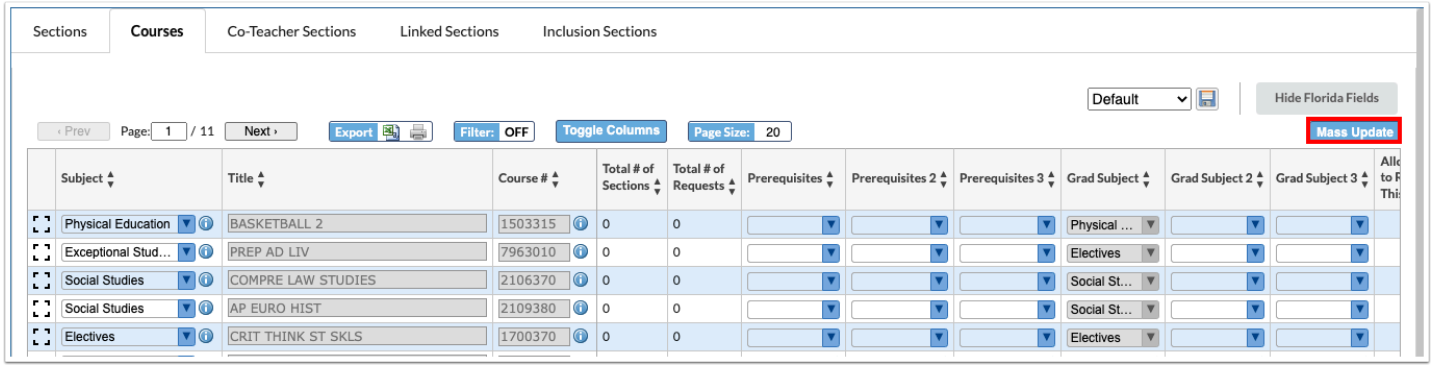
The changes are auto-saved.

## Mass Updating the Report

The Mass Update feature is used to make updates to course or section information en masse. Only editable fields can be mass updated.

**1.** Click the desired tab.

**2.** Click **Mass Update**.




**3.** In the Mass Update pop-up window, select the **Column** to update.

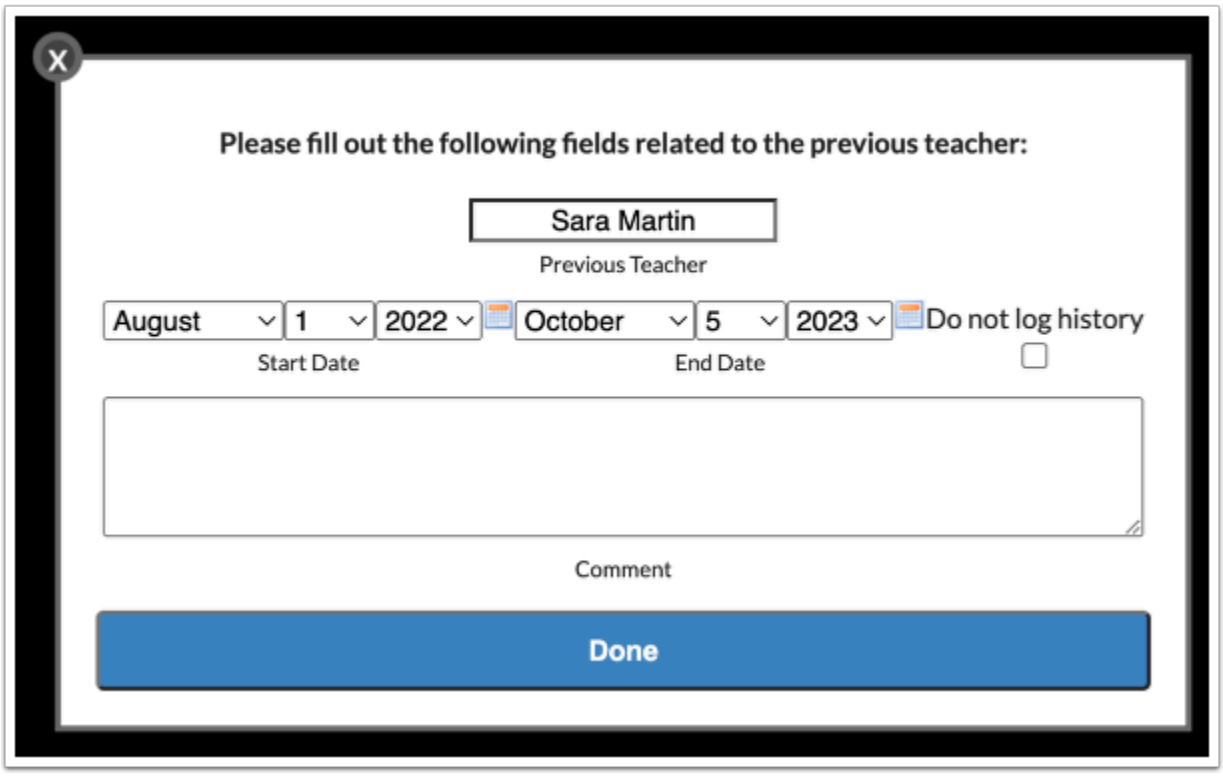
**4.** Enter or select the **Value.**

**5.** Click **Update**.

**6.** The column is updated with the value entered. The fields where the value was changed from the original value are highlighted in yellow.

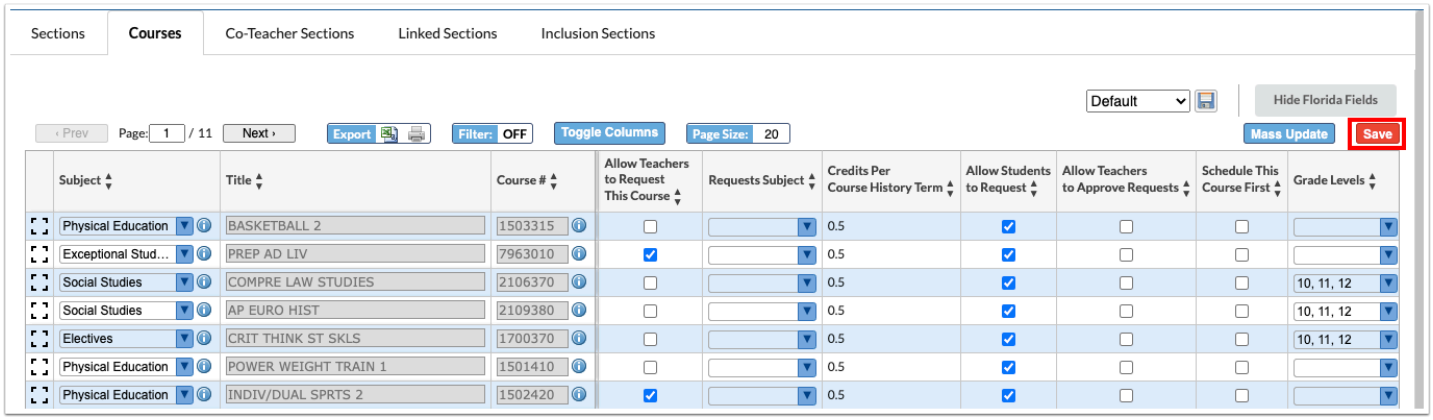
**7.** Click **Save**.

Changing the teacher from the Master Schedule Report allows the option to log the teacher change, which will display on the History tab for the section in Courses & Sections. When changes are made PRIOR to the start of the school year, select the checkbox Do not log history when the popup displays.




**8.** Verify the change is correct.

**9.** Click **Save**.




# Activity

Sections tab: Verify that all sections have Periods, Teachers, Rooms, Seats, and Minutes.

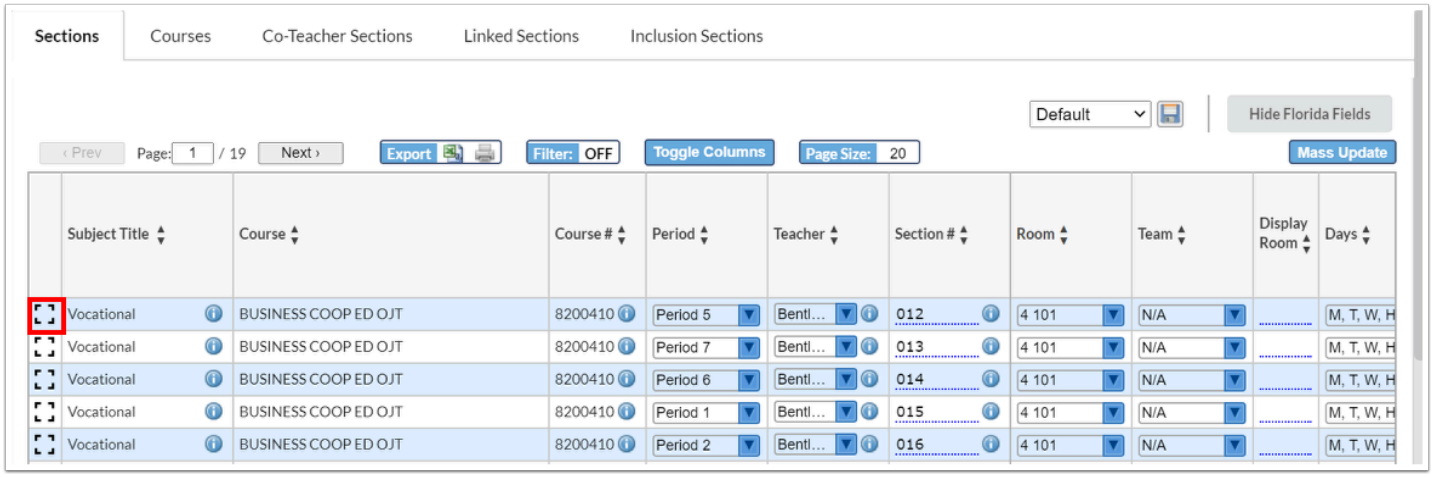
Mass update any known Teacher changes (TBAs, retired, transferred etc.).

Courses tab: Review for Prerequisites, Grade Level Restrictions or other relevant fields.

# Additional Options

Individual records on the Master Schedule Report can be expanded in a pop-up modal for easier viewing and editing.

**a.** Next to the record you want to view or edit, click the modal icon.

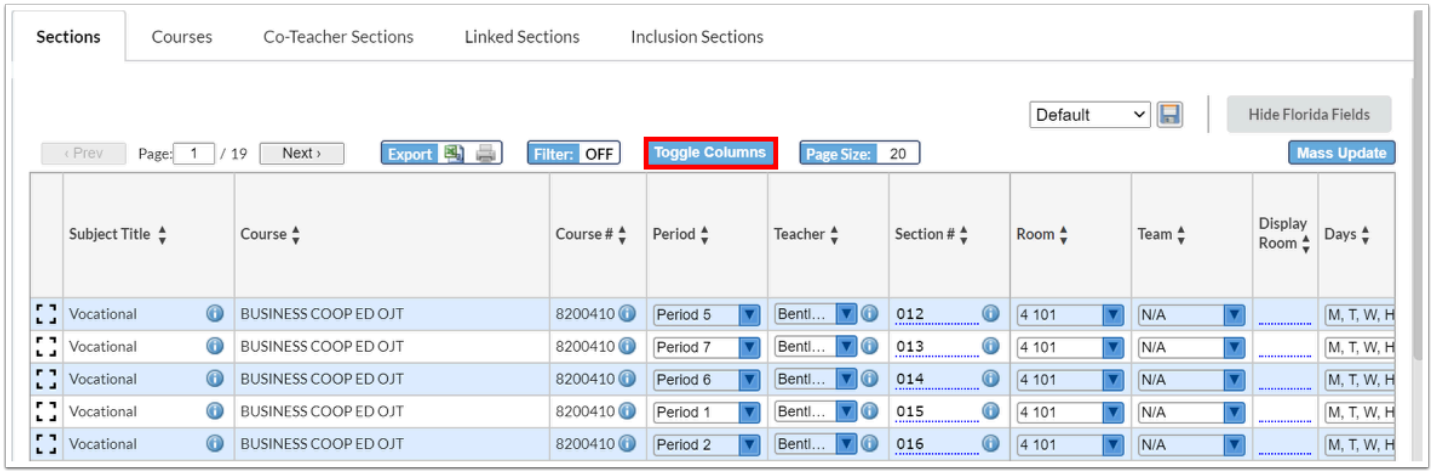



**b.** At the bottom of the window, blue arrow buttons are displayed, allowing cycling through the other records without having to close the modal.

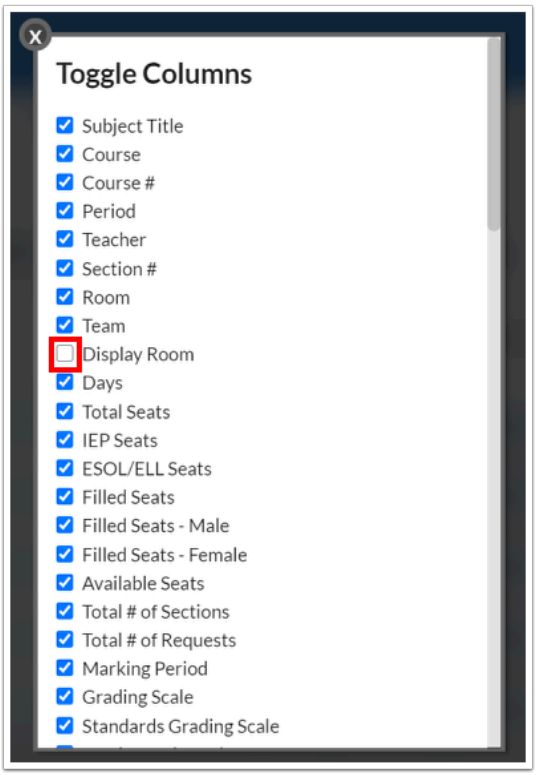
**c.** Any changes made in the modal are saved automatically. To close the modal, click **Close**, press esc key, or click the dimmed background.

The Toggle Columns button is used to customize the columns that are visible on each tab of the report (with the exception of the Linked Sections tab). The Page Size field is used to set how many rows are visible on each page.

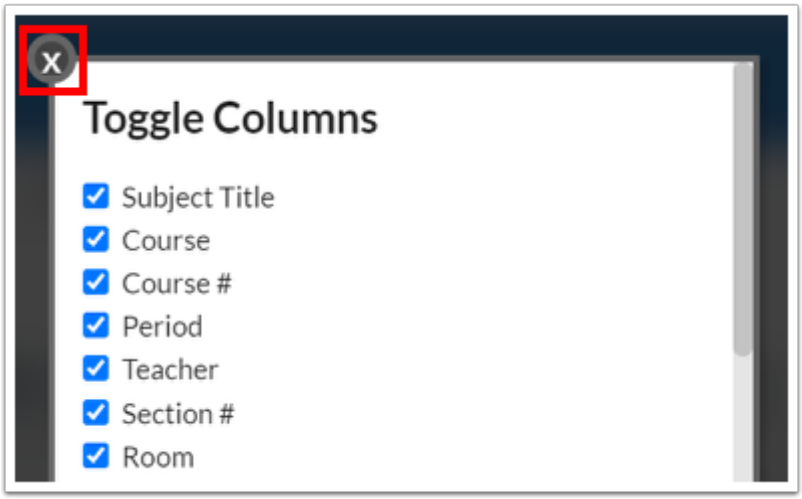
**a.** To customize the columns displayed on the report, click **Toggle Columns**.




**b.** In the Toggle Columns pop-up window, deselect any of the columns you do not want to view in the tab and select any columns you do want to view.




**c.** When finished, click the **X** to close the Toggle Columns window.



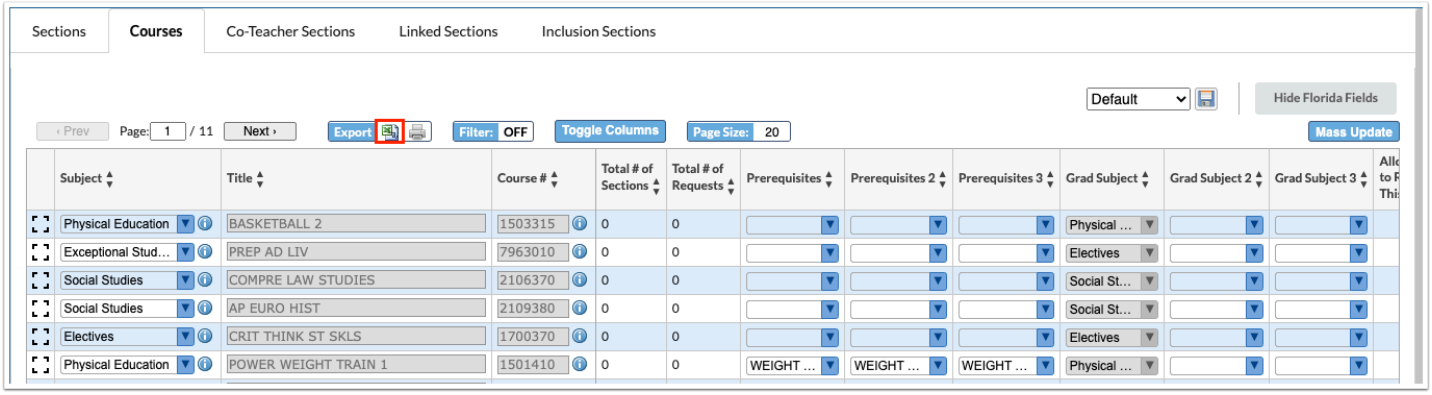

The report is now customized to only display the selected columns. The report will display as customized by you each time the report is accessed.

To customize how many rows of information are displayed on each page of the report, enter the number of rows in the **Page Size** field and press **Enter**.

The report is updated to only display the number of rows indicated per page.

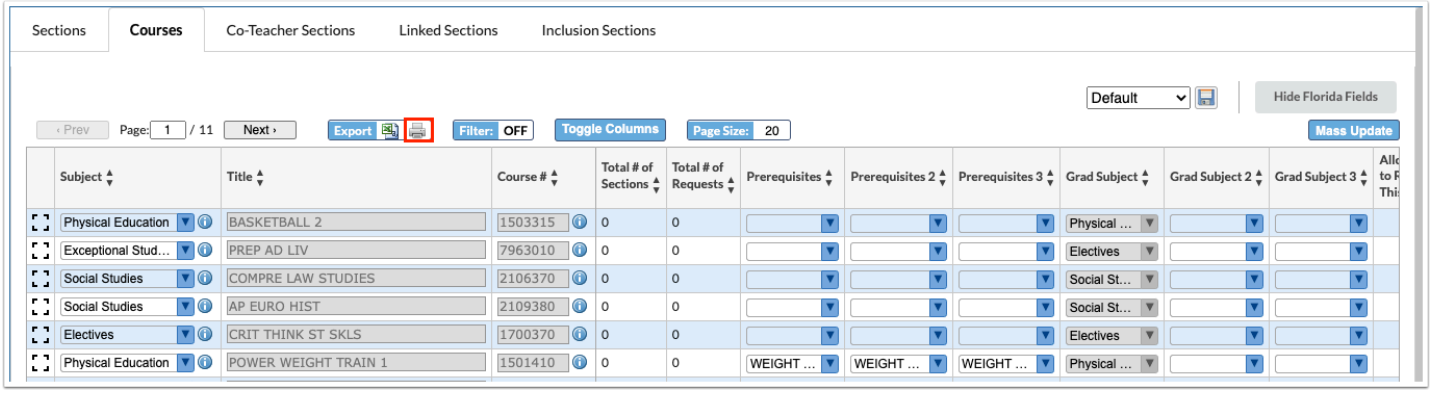
Each tab of the report can be exported to Excel or printed.

**a.** Click the **Excel** icon next to Export.




**b.** Follow your browser's prompts to open or save the file.

**c.** To print the report, click the **Print** icon next to Export.

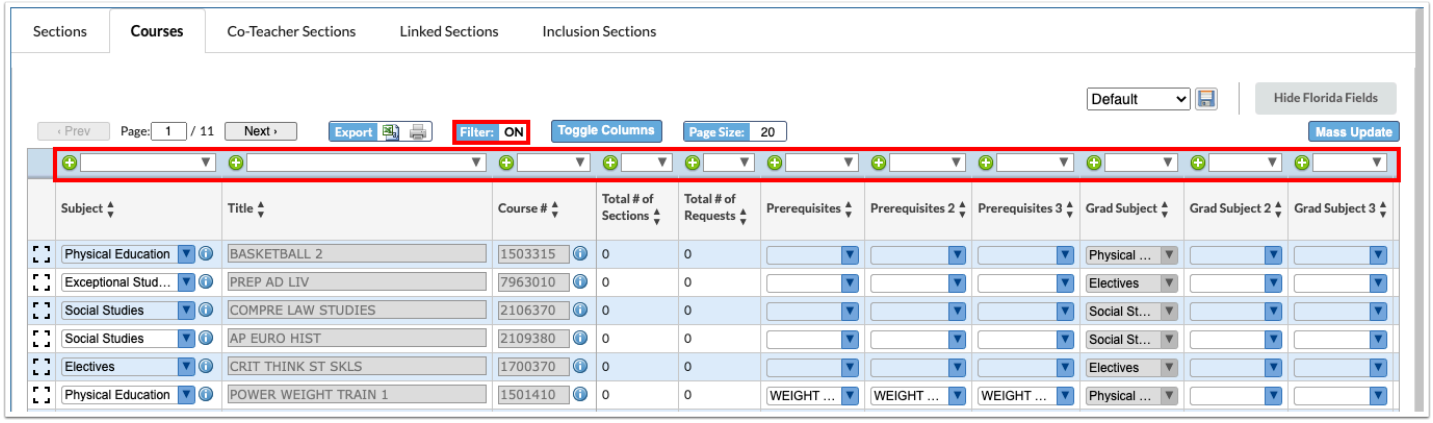



**d.** In the print dialog window, select the options to print the report.

The Filters feature is used to filter the report based on data in a particular column. Filters are available in each tab of the report.

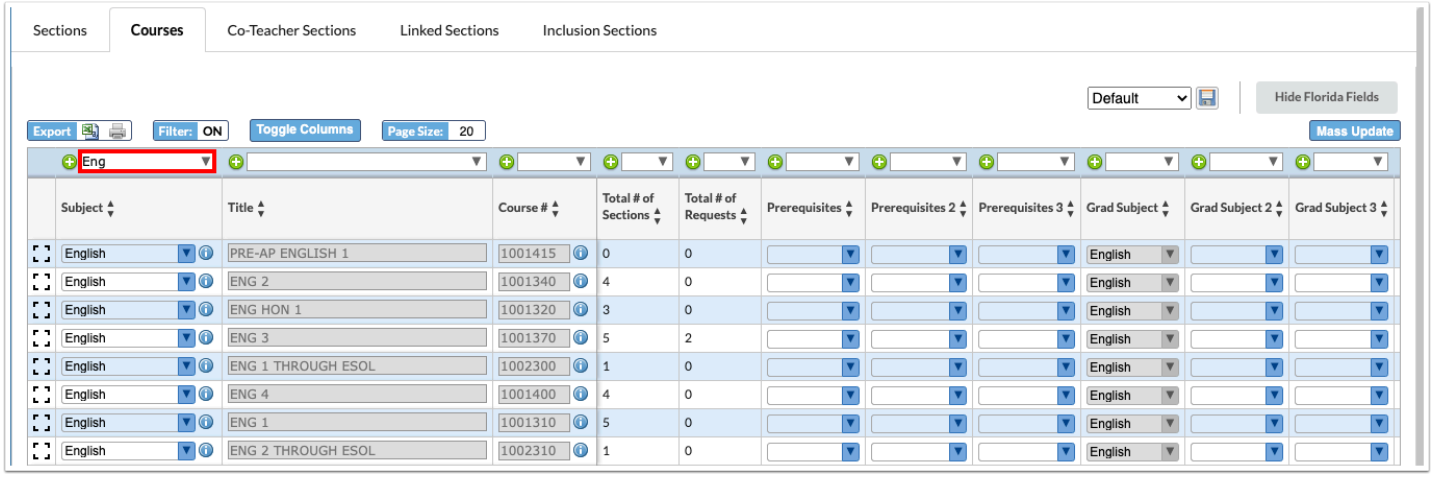
**a.** Click **Filter** so that it says Filter: ON.

Filters display above the columns that are able to be filtered.

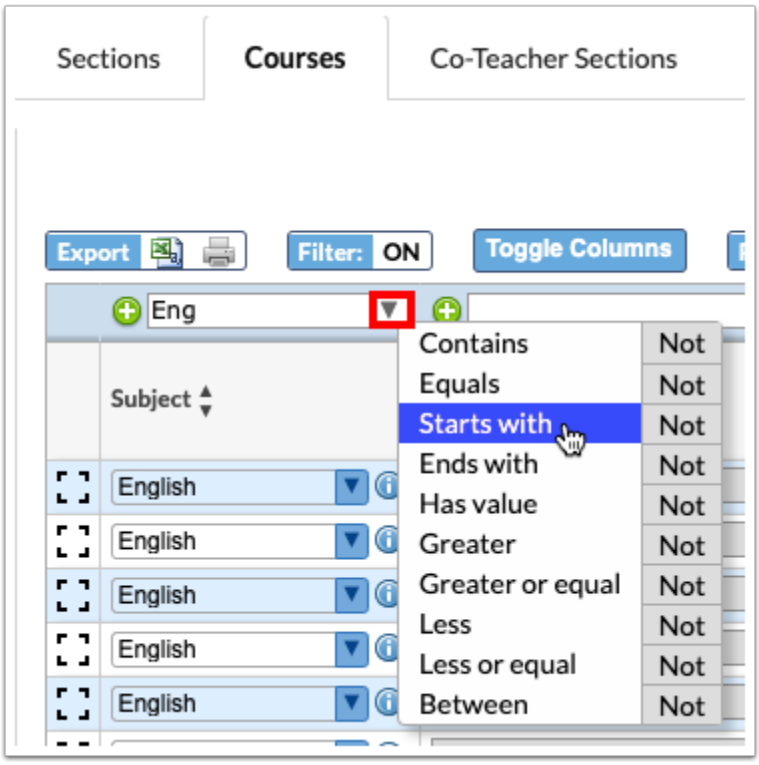



**b.** In the filter text box, begin typing the filter criteria.

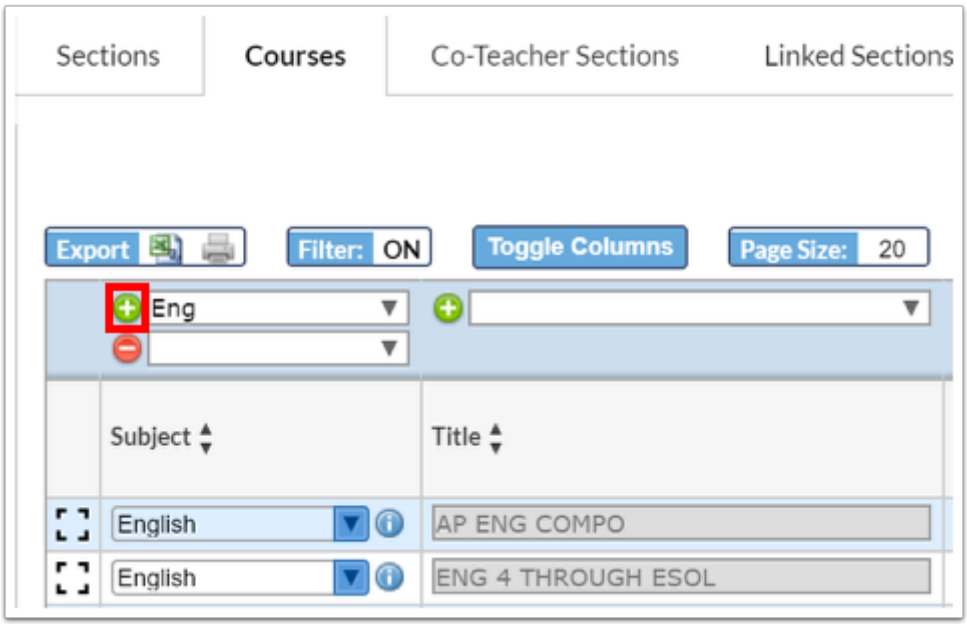
The report will filter as you type.



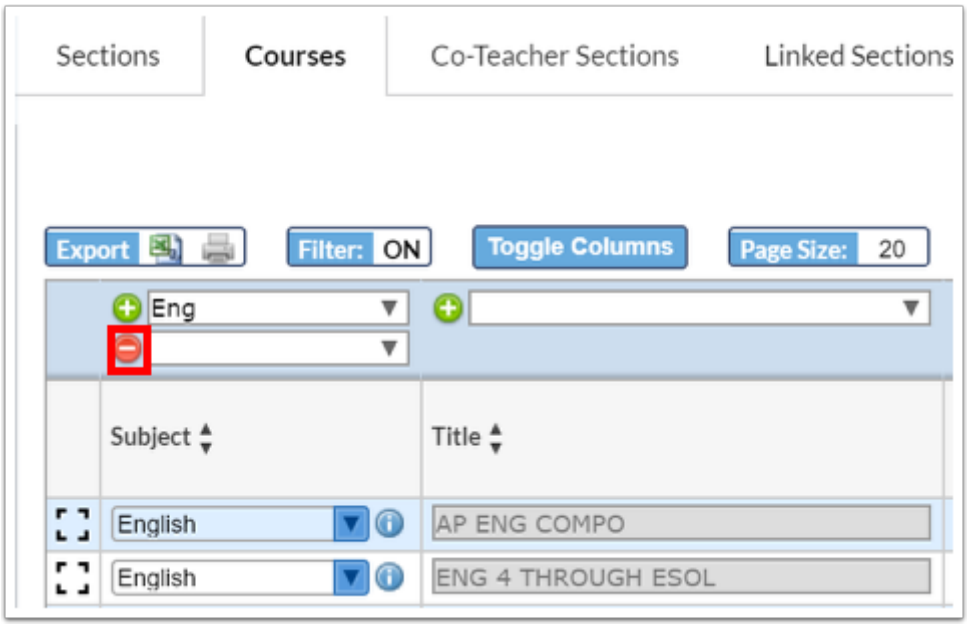

**c.** Click the down arrow to select a filter option.



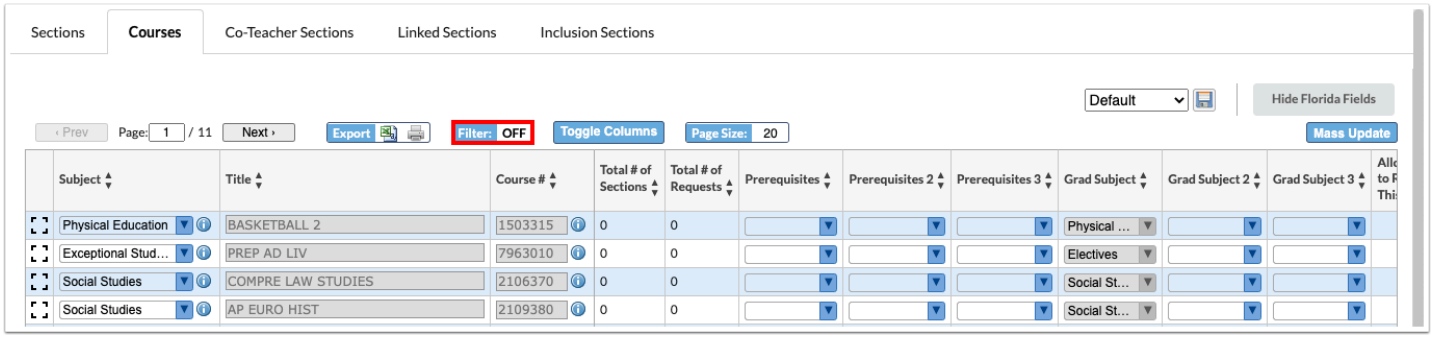

**d.** To add an additional filter to a column, click the green plus icon.




**e.** To remove a filter from a column, click the red minus sign.




**f.** To remove all filters, click **Filter** so that it says Filter: OFF.

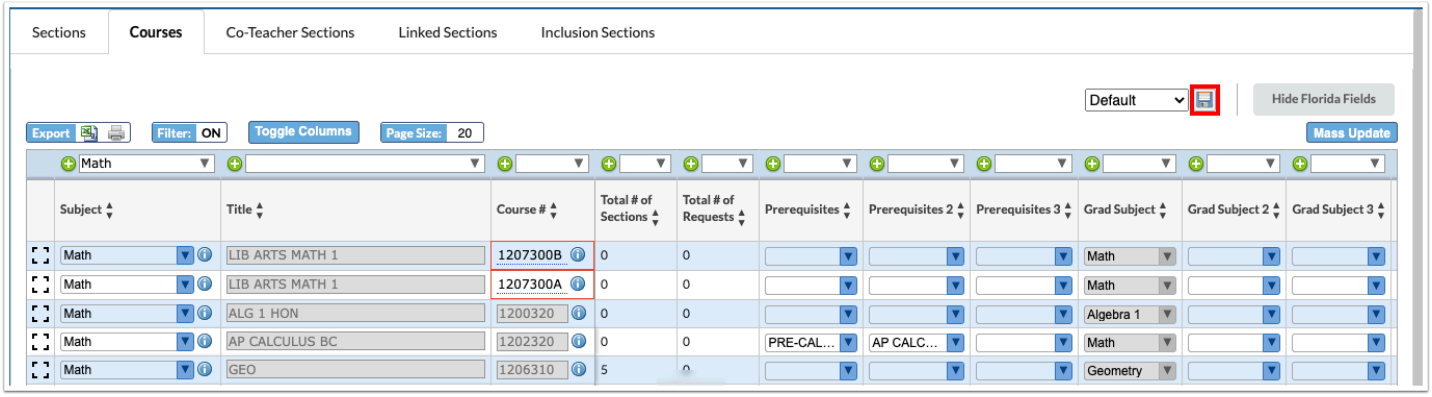



# Saving Filtered Reports

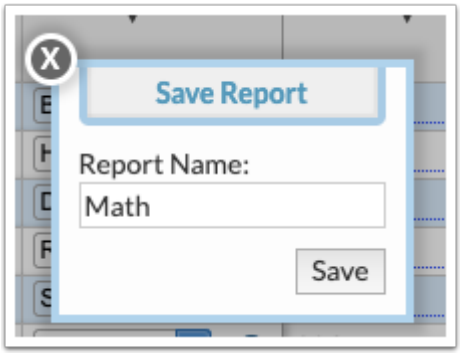
After filtering the report, the report can be given a title and saved. Once saved, the report is available in a pull-down on the Master Schedule Report screen, along with the Default report, and can be re-run as needed. The saved report is also available in the Reports menu under My Reports, and in the Saved Reports screen, where it can be shared with other users if you have permission to publish reports.

**1.** After filtering the report, click the **Save** icon.

Your Toggle Columns and Page Size settings will also save to the report.




**2.** In the pop-up window, enter a **Report Name** and click **Save**. Close the pop-up when finished.




The saved report is now available in the pull-down, along with the Default report.

**3.** If you make additional changes to the saved report, click the up arrow icon to update it.

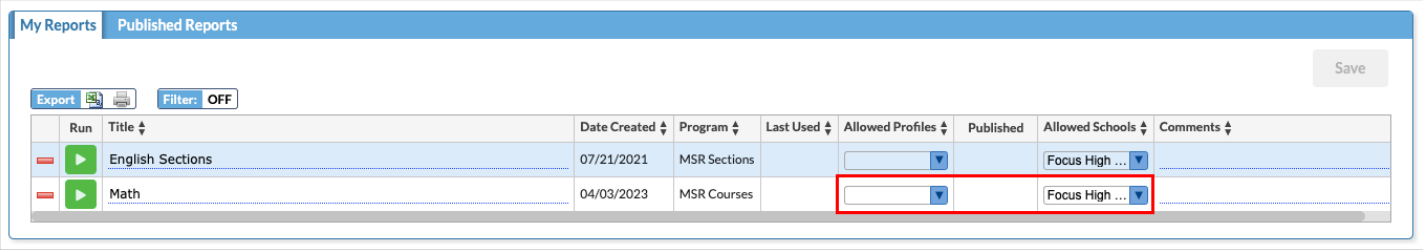
**4.** In the pop-up window, modify the **Report Name**, if desired, and click **Save**.

**5.** To delete a saved report, select the report from the pull-down and click the delete icon.

**6.** In the confirmation message, click **OK**.

Saved reports are available in the My Reports section of the Reports menu, and on the Saved Reports screen.

From the Saved Reports screen, reports can be shared with specific schools and profiles if you have permission to publish reports.




# Section Fields Explained

- **Teacher**: Select the teacher assigned to the section. The teacher's staff number displays next to the teacher's name. Only active users with a Teacher profile will be available for selection.
- **Room**: Enter the room number. If rooms have been set up in Setup > Resource Scheduler/ Rooms, select the room from the drop-down. If the Homeroom Number field is set in the Teachers tab of the user's record, the room number will auto-populate in the Room field on the section when the Teacher is selected.
- **Resource Display Room**: When the system preference "Default section display room to resource display room" is enabled in Setup > System Preferences > Scheduling tab, the Display Room column is available in Setup > Rooms. When a Display Room is defined on the Rooms screen, it is populated in the Resource Display Room field on the section. The Resource Display Room displays as the room for the section throughout Focus, including on the Teacher Schedules Report, Student Schedule, Print Student Schedules, etc. The Display Room Option field on the section in Courses & Sections can be used to override the Resource Display Room.
- **Display Room Optional**: If the room number that should display on schedules differs from the room number in the Room field or the Resource Display Room field, enter the display room number or room name (e.g. gym, band).
- **Period**: Select the period the section will meet. If the system preference "Enable Ending Period" is turned on in Setup > System Preferences > Scheduling tab, select the beginning period in the Beg field and the ending period in the End field.
- **Bell Schedule:** Select the bell schedule the section will follow if there is more than one bell schedule set up for the school in Setup > Periods. If the school only has one bell schedule, this field will not display on the section.
- **Rotation Days**: If the school uses rotation days, select the rotation days the section will meet. If the section meets on all rotation days, select all the check boxes; do not leave them blank. The length of the rotation and the rotation day label (letters or numbers) are set up in Setup > System Preferences > Scheduling tab using the "Advanced Rotation" and "Rotation Day Label" preferences. If the school does not use rotation days, this field will not display on the section.
- **Meeting Days**: Select the days of the week the section meets (for state reporting). If rotation days are being used, do not modify the meeting days.
- **Marking Period**: Select the full term of the course (full year, semester 1, semester 2, quarter 1, etc.). This indicates the seat time of the course.

- **Seats**: Enter the maximum number of students who can be enrolled in the section. The Scheduler will never exceed this value when scheduling students, though administrators can override the seat maximum when manually scheduling students.
- **IEP Seats**: Enter the maximum number of IEP students (students who have an entry in the ESE Exceptionalities logging field marked as Primary) that can be enrolled in this section by the Scheduler. If this field is left blank, there is no restriction.
- **ESOL/ELL Seats**: Enter the maximum number of ESOL/ELL students that can be enrolled in this section by the Scheduler. If this field is left blank, there is no restriction. Logic for determining ESOL/ELL students:
  - Florida - English Language Learner (custom_626) has a value of LY
  - Texas - Bilingual/ESL/LEP History log field (custom_400010549) - LEP Code (log field 4) has a value of 1
  - Baltimore - English Language Learner (custom_626) has a value of ELL

- **Short Name**: The Short Name will auto-populate with the next increment but can be edited as needed. Short names must be unique for all sections within a course.
- **Course History Term**: Select when grades should be sent to Course History (e.g. at the end of each quarter, at the end of each semester, or at the end of the school year).
- **Double Blocked**: The Double Blocked field is used for posting grades. This is typically used if one school in the district uses a 4x4 block schedule and the rest do not. If a course in the Course Catalog is assigned 1 credit for a Full Year grade posting window, but the section is a double-blocked section meeting every day, then the 1 credit needs to be posted at the end of the semester. When this check box is selected, the system will post the credit at the semester instead of the end of the year for this section. This field is also used to calculate the credits/units set in Student Requests and the Requests Reports. This field is only displayed on the section if the system preference “Enable Special Double-Blocked Posting Averaging” is turned on in Setup > System Preferences > Grading tab.
- **Takes Attendance**: Select the check box to designate that this section takes attendance.
- **Graded**: Select the check box to designate that this section is graded.
- **Affects GPA:** Select the check box to designate that this section affects GPA.
- **Active**: Select the check box to designate that this section is an active section. Deselecting the check box will prevent students from being enrolled in the section. Only sections that do not have students currently enrolled can be marked as inactive. Inactive sections do not display on the Teacher Schedules Report. Attempting to add an inactive section to a student’s schedule in Student Schedule or Mass Add Course will display an error message.
- **Gender Restriction**: If enrollment in the section is limited based on gender, select the appropriate gender.
- **Grade Levels:** If enrollment in the section is limited based on grade level, select the appropriate grade levels.
- **Team**: If your school uses team scheduling, select a team to restrict enrollment in this section to students assigned to the team. If teams are not set up in Scheduling > Teams, this field will not display on the section. See *Assigning a Team to a Section* below for more information.
- **Grading Scale**: Select the grading scale used to post grades for the course. Grading scales are set up in Grades > Grading Scales & Comments. The grading scale can be set to null (blank) if the section does not post final grades. The teacher will not receive alerts to post

final grades for the section, and the teacher will not display on the Final Grades tab of the Teacher Completion report for the section.

- **Standards Grading Scale**: Select the grading scale used to post standards grades for standards assigned to the course. Standards grading scales are set up in Grades > Grading Scales & Comments. The standards grading scale can be set to null (blank) if the section does not post standards grades. The teacher will not receive alerts to post standards grades for the section, and the teacher will not display on the Standard tab of the Teacher Completion report for the section.
- **Grade Posting Scheme:** Select the grade posting scheme, which designates how semester and full year grades are calculated for the section. Grade posting schemes are set up in Setup > Grade Posting Averaging.
- **Calendar**: Select the calendar the section will follow (if there is more than one calendar set up for the school).
- **Parent Section**: Select a parent section for the section, if applicable. Sections are packaged for the purpose of linking the sections together for scheduling. This is most often used in elementary scheduling when sections for language arts, math, science, art, music, etc. are packaged together with the homeroom section as the parent section. When scheduling students, students scheduled into the parent section will automatically be scheduled into the child sections. See *Packaging Sections in Courses & Sections* below for more information.