

Unit 5: Master Schedule

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Important:

Homework for Unit 5 due BEFORE the meeting:

- 1** Assign constraints to specific classes
- 2** Create Teams
- 3** Assign Teams to specific classes in Master Schedule

Load Student Schedules

If your school schedules students by teams and you want to assign students to specific teams, use reservation labels. When you use reservation labels to assign students to teams, the team name prints on reports and schedules. The following procedure describes the overall steps required to use reservation labels to assign students to teams. (For more information about working with teams, see Setting Up Team Loading Rules in the Chancery SMS Scheduling Guide).

- 1 Create a reservation label for each team. For example, Tigers, Lions, and so on.
- 2 Associate the reservation labels with teams.
- 3 Assign a meeting pattern to the reservation label.

NOTE

Create and assign a special meeting pattern that meets outside school hours.

- 4 Assign a primary request for the reservation label to students.
- 5 Load student schedules
 - To easily identify students who have not been assign specific classes, assign unique scheduling loads. For example, to identify students who have not been assigned a period, assign a scheduling load of .1 to the reservation label. After loading students, students who have .1 added to their scheduled load have been scheduled for a reservation label.
 - When running the Student Loader for the first time, turn off the Use Alternates option on the Student Loader Options page. Disabling this option forces the Student Loader to schedule primary requests only. Turn on the Use Alternates option for subsequent runs of the Student Loader.
 - When the Student Loader attempts to schedule students into classes, it will try a limited number of possible schedules before moving on to another student. Plan to run the student loader several times, each time selecting the remaining unscheduled students. This is a way to get the loader to “try a little harder” on the hard to schedule students. The results vary, but several extra runs like this can often squeeze out quite a few more fully scheduled students.
 - To find unscheduled students, on the Student Loader page, search for students whose Scheduled Load is less than the value you consider to be a full load.

OR

On the Student Detailed Search page, search for students whose Unscheduled Primary Requests equals true. Create a saved list for those students, and then open the saved list on the Student Loader page.

Balancing Class Sizes Across Classes

After running Student Loader, if you find that some class sizes are not balanced across all available classes (e.g., classes sizes for a course with three available classes are 35, 35, and 20), adjust the maximum size to be closer to the optimal class size and rerun the Student Loader for all students in the changed classes. For example, you might set the maximum class size from 35 to 30.

TIP

If, after adjusting class capacities, re-running the Student Loader doesn't produce the results you would like, try creating a new planning schedule as a copy of the current planning schedule and clearing the students' schedules before running the Student Loader. Running the Student Loader without any students scheduled may produce better results. (For information about clearing student schedules, see "Clearing Student Schedules" on page 14).

Once the class schedule is created, set the maximum class size back to its original value to avoid receiving overload messages when adding and dropping students throughout the year.

- If you are concerned about balancing class sizes for all courses, before you create classes, use the Course Request Tally to adjust the maximum class size so all courses have just enough space for the number of requests you have (e.g., if you have 100 requests and you plan to offer 4 classes, set the maximum class size to 25). After you finish loading student schedules, manually readjust the capacity of each class (through the Master Schedule) back to the "real" level to allow for walk-in scheduling at the start of the school year.

NOTE

If class sizes are not balanced across classes, the number of students may be out of balance due to conflicts in the Master Schedule. Adjusting the class capacities may force one set of classes to balance but throw other classes out of balance.

Before you invest the time in adjusting capacities as indicated above, make an effort to ensure the problem is not being caused by conflicts on the Master Schedule.

Clearing Student Schedules

If students are scheduled for a class and the meeting pattern for that class is changed, the class appears on the student's schedule in the new meeting pattern, which may conflict with other classes on the student's schedule. To reschedule classes for those students, re-run the Student Loader.

If you need to make numerous changes to the meeting patterns assigned to courses that have already been scheduled, you can avoid receiving repeated messages about the effect on student schedules if you clear the students' schedules before changing the meeting

patterns. The Student Loader may also produce better results when starting with empty student schedules.

TO CLEAR STUDENT SCHEDULES:

- 1** Create a course that cannot be scheduled, for example, set the Max Size for the class to zero.
- 2** Assign a primary course request for the created course to the students whose schedules you want to clear.
- 3** On the Student Loader Options page, set the “If a student has more than x unscheduled requests, do not schedule at all” option to 1.
- 4** Run the Student Loader.

Setting Student Loader Options

1. Make sure you are using a School Administrator role for a secondary school.
2. Make sure you are using the correct planning calendar.

For information on switching to a planning calendar, see [Switching to the School Planning Calendar](#).

3. In the control bar, under Admin, *click* Scheduling.
4. On the Scheduling page, from the Planning Schedule dropdown, choose the planning schedule you want to work with.

The messages to the right of the links summarize what is set up for this planning schedule.

If you copied scheduling elements when you created the planning schedule, you can modify the scheduling elements you copied.

5. On the Scheduling page, under Step 7, *click* Student Loader Options.
6. On the Student Loader Options page, enter the following information:

Field	Description
Class Overfill %	Specify a percentage between 0 and 100. Allows the class capacity to be exceeded by this percentage. You can use this option temporarily in a test run of the Student Loader to see where the "spikes" are, which shows you which course need extra classes. You can also use this setting to allow extra room in classes.

<p>If a Student Has More Than n Unscheduled Requests, Do Not Schedule At All</p>	<p>Specify a number between 1 and 99. If the Student Loader is unable to find a schedule for a student that falls within this limit, it leaves the student completely unscheduled. Adjusting this number allows you to minimize the number of students left with partial schedules after a run of the Student Loader.</p>
<p>Attempt to Re-schedule Students to Avoid Conflicts Caused by Full Classes</p>	<p>This option tries to make room in full classes by shuffling students. The Student Loader tries to re-schedule students with a lower scheduling difficulty in order to schedule students that are more difficult to schedule. For an example of using this option, see Example of Attempt to Re-Schedule Students to Avoid Conflicts Caused by Full Classes.</p>
<p>Attempt to Schedule an Equal Number of Students to Each Class Choice for Each Course</p>	<p>When classes reach 50% of their average class size, the Student Loader progressively opens the unused 50% to keep classes as level as possible.</p>
<p>Use Alternates</p>	<p>Schedules a student's alternate course requests to find a schedule. You might want to make early runs of the Student Loader without using alternates. Then turn this option on in later runs to get more flexibility to schedule the more difficult to schedule students.</p>
<p>Weighted Options</p>	<p>Use weighted options to specify which factor has priority when loading students. Move weighted options so they are in order of priority. The Student Loader schedules according to the order of the selected weighted options. By default, all weighted options are selected in the following order: load balancing rules, class sequencing rules, class attribute rules, term preferences.</p>
<p>Use class load balancing rules</p>	<p>This option instructs the Student Loader to try to find a schedule that balances the student's classes covered by class load balancing rules between terms.</p>
<p>Use class sequencing rules</p>	<p>This option instructs the Student Loader to try to find a schedule that sequences classes between terms or periods for the student's classes covered</p>

	by class sequencing rules.
Use class attribute rules	This option instructs the Student Loader to try to find a schedule that has classes with the same or different attributes in any of the student's classes covered by class attribute rules.
Use term preferences	This option instructs the Student Loader to consider the term preferences that might have been entered for a student's course requests when finding a schedule for a student.

7. *Click OK.*