ASPIRE

Scheduling: Requests

Contents

Course Requests

Course requests are the heart of the student scheduling system. Both mass scheduling and individual scheduling systems are based on student course requests. Student course requests allow schedulers to see the demand for courses before finalizing the schedule structure.

Each course request identifies the need of a student to take a course. The cumulative counts of requests make it possible for school administration to make decisions on course offerings to meet student needs.

Requests may be manually entered into the system one at a time (Individual Requests) or generated in mass through the system (Mass Requests), or a combination of these methods.
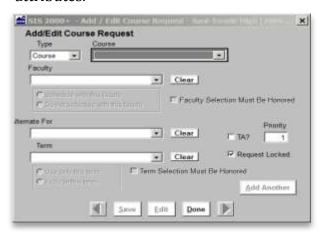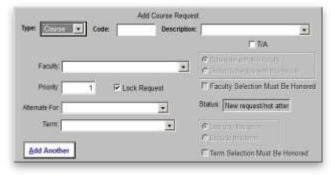
Once the requests are in the system, scheduling mechanisms like **Student Schedule Editor**, **Walk In Scheduler** (WIS) or **Loader** place students into classes in the master schedule.

Request Elements

Requests are processed within the system rules based on the attributes of each request. Different screens in the system allow entry of a variety of values for request properties. Each request attribute effects how the request is processed by the system when it is scheduled.

The **Student Schedule** and **Course Request** creation tools let you enter values for all the request attributes.

Other Request creation tools give you minimal access to the request attributes. **Rapid Requests** and **SEOP Requests** limit data entry to Course Code and/or Course Description. This is just enough information to create the request but may not represent specific individual course request needs.
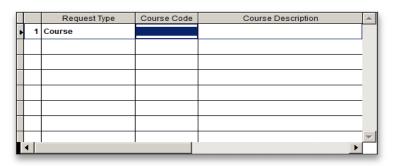
Individual requests may need to be changed to accommodate exacting individual needs.

The Career Plan interface gives you a few additional request attribute options. Again, detailed adjustments to requests generate through a Career Plan may need to be adjusted to accommodate individual needs.

Course Request Attributes

Request Type

Choosing the request type determines the code / descriptions available. Course is the default choice. When "Course" is selected all the courses assigned to the track in the Course Selection are available for scheduling.

Code / Description

Enter the code or select the description to complete the code/description selection. The request attribute options will change based on the request type.

Faculty

Optional. Only available for course request types. Select a preferred faculty or leave it blank.

Alternate

Optional. Names of the request that this course is an alternate for.

Term

Optional. The scheduling term that is associated with the request.

Priority

The scheduling priority of this request in relationship to other requests.

Loader, the automated scheduling mechanisms of SIS 2000+, uses the priority to determine which requests to schedule first. Acceptable priority values are 1-999. 1 is the highest priority. A 0 is considered to be 1000, the lowest value. The default value is 1.

TA

Denotes the request is for a student to be a TA in the course (see the Schedule Teacher Assistant documentation.)

Lock

Requests that are flagged as locked are not cleared when automatic request tools in SIS clear out request as part of their processes (Mass Requests, Career Plan).

Getting Course Requests into the System

SIS gives you 6 different ways to get course requests into the system. Each method has its own peculiar characteristics. There are 4 ways of creating course requests which focused on individuals and 2 ways of fostering group (mass) creation / updating of requests.
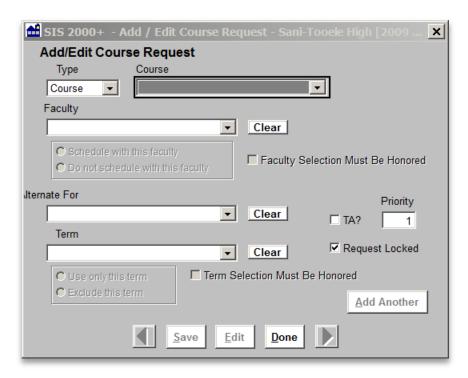
Individual Requests

The 4 ways to enter requests for classes' for a student at a time are Student Schedule, Course Requests, Rapid Requests and SEOP Requests. **Student Schedule** integrates creating full option

requests in the course scheduling process. **Course Requests** focuses on entering course requests with all the options for individual students. **Rapid Requests** provides a quick minimalistic course request entry interface based on course number. **SEOP Requests** are the way for students, parents and counselors to input individual student requests in the context school graduation requirements and long term career planning.

Student Schedule

The "Add" button in the Scheduling > Student Schedule Module is for adding requests to the selected student. (See the Student Schedule Module Documentation.)

The Course list lets you choose courses made available to the selected track in the Course Selection Module. The list is ordered by course number. After selecting the Course dropdown list you can quickly type the beginning digits of the coures number to jump to the course on the list. You can also arrow up and down the list.
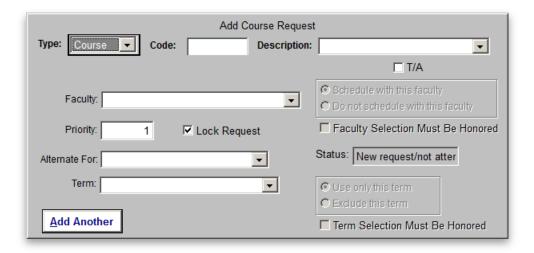
After entering all desired choices click the "Save" or "Add Another" button. The save button saves the request and closes the request entry window. This is used when you are done entering the requsts for a student. If you have additional requests to enter for the selected student clicking the "Add Another" button saves the current request and keeps the request entry window open ready for the next request entry.

The course is the only required field for creating a request. Other choices determine how the request handled as it is processed into a course on the Master Schedule.
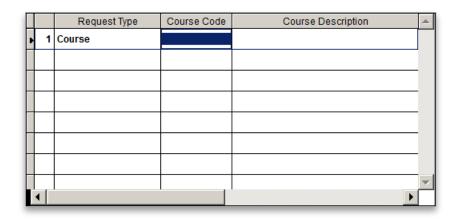
Course Request

Scheduling > Mass Scheduling > Course Requests provides access to all request properties. This includes the "Status" of the request. The status reveals whether it is "New", "Modified", scheduled or unable to be process for some reason. This status is also displayed on some of the Course Request reports.

Rapid Requests
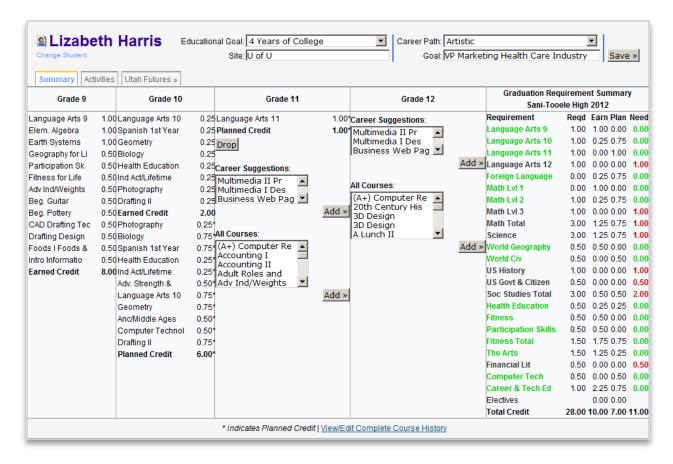
Scheduling > Mass Scheduling > Rapid Requests makes it easy for office staff and others to quickly enter requests when the course code is known. Typically, schools call for student course requests. These often come in the form of paper documents identifying elective or other schedule choices listed by course numbers. With these types of documents in hand the requests can be efficiently entered into the system with Rapid Requests by looking up the student, enter the Course Codes and click "Save".

SEOP Request

The SEOP requests are generated as part of the SEOP process if the requests part of SEOP is setup and turned on. Details can be found in the SEOP Documentation on how to do this.

Process Requests in Mass

The 2 ways to enter requests for masses of students at a time are Mass Requests and Career Plans. **Mass Requests** is the best way to create requests with all options for masses of students at a time. **Career Plan** provides the way to create and save for future use groups of automated minimalistic course requests to masses of students at a time.
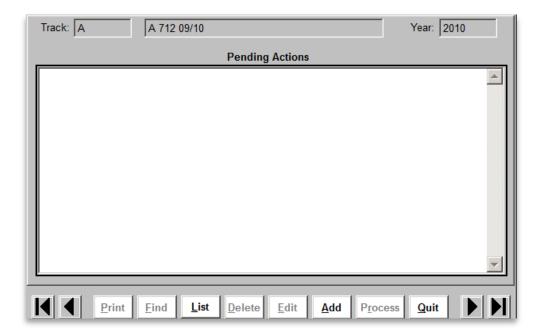
Mass Requests

Scheduling > Mass Scheduling > Mass Requests allow users to create multiple bulk requests to process in a single session. The process requires 2 steps. Step 1 is to create multiple mass requests. Step 2 is to process the mass requests before ending the session.

Creating Mass Requests

The primary goal of "Mass Requests" is to generate many requests for groups of students based on a set of rules. For example, when all 9th graders are required to take a Language Arts course it makes sense to generate requests for all 9th grades at once, in mass. Most school scheduling scenarios have multiple classes required by most of the students in specific grades. Mass Requests provides a way to create and manage these "Pending Actions" before they are run in bulk.

To perform these tasks launch Scheduling > Mass Requests > Mass Requests. Choose the track you want to work with by clicking "List". Then click "Add" to create new "Mass Requests".
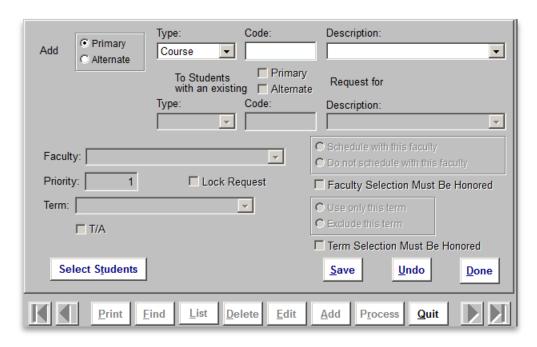

Initiate the mass request creation process by clicking the type of requests you want. "Add Requests", "Change Requests" or "Remove Requests" are types of actions from which to choose.
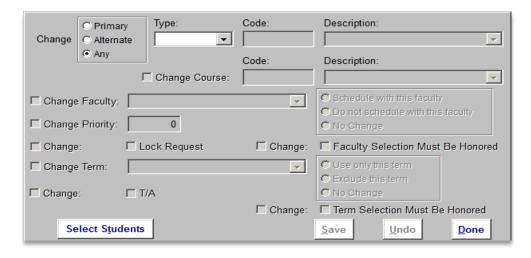
The request parameters screen opens. Enter the details of the request you want to create. Add, Change and Remove - each has different options on the screen.

On the "Add Requests" screen you see the Primary / Alternate choice which determines the type of request. Primary creates a course request for the specified course. Alternate activates the "To Students with an existing 'Request for'" fields. The alternative course request will be added with an association to the Primary course request in the "Request For" fields.
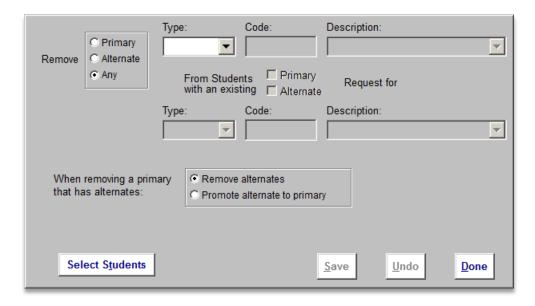
Various elements are activated based on the choices made on the screen.

The "Change Requests" screen gives you options to specify which values to change on requests you already have in the system. The changes you make here will be applied to requests existing in the system at the time it is run, based on the Course and Students Selected.
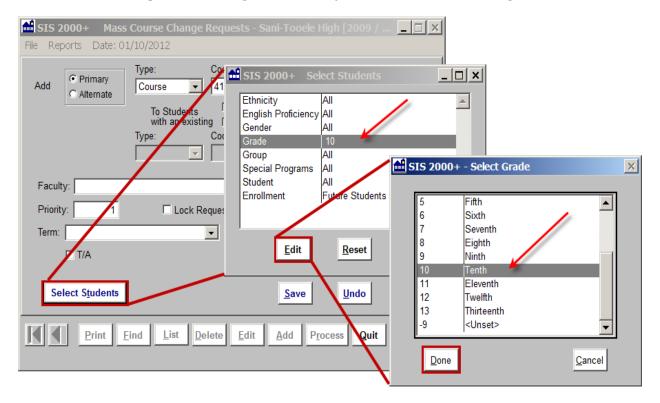
The "Remove Requests" gives you a way to remove existing requests in mass based on the values selected on this screen.

"Select Students" on each of the Mass Requests screens allows exacting criteria to narrow down the number of students affected when the Mass Requests are processed. In this example, you can see where mass requests will be generated only for students in the 10th grade.
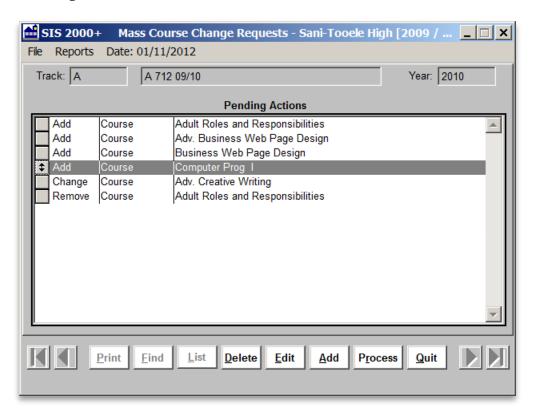
Mass Requests Queue

As you save the details of each mass request they are queued up for processing. After saving the last mass request and clicking "Done" then you will see the list of mass requests you created.

You see there are several menu choices along the bottom of the list. These become active after you have several mass requests on the list. They allow you to manipulate the items on the list.

Mass requests are processed from the top down. You can change the order of requests processing by dragging the mass request up or down the list. Click on the box just to the left of the course information and drag it to a new location.

Delete, Edit and Add menu items let you manage the mass request you have selected on the list.

Clicking "Quit" before the mass requests are processed results in this warning.

Be sure to process the mass requests in a timely manner. There is no way to save the mass requests for later processing.
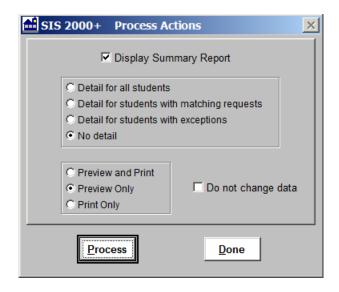
Clicking the Process button initiates the process of all the mass requests. You are prompted with several processing options.
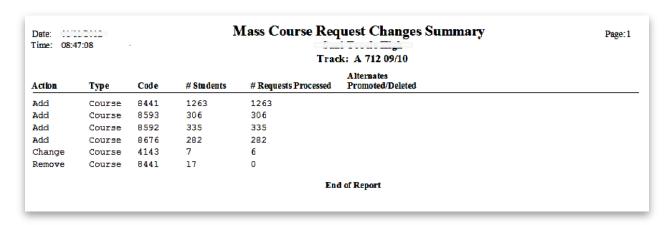
The Report has an on/off switch in the "Display Summary Report" checkbox. Want the report? Better mark the checkbox. (It is checked by default.)

Another noteworthy feature is the "Do not change data" option. This is helpful if you want to get an idea of how the requests will stack up before actually creating, changing or removing requests in the system.

Preview only lets you see the results on the screen. Print forces the Summary Report to print to your default printer. When you are done making your choices click Process.

The resulting report shows the number of requests processed and the number of students affected.

Date:					Mass Course Request Changes Summary		Page: 1
Time: 08:47:08							
					Track: A 712 09/10		

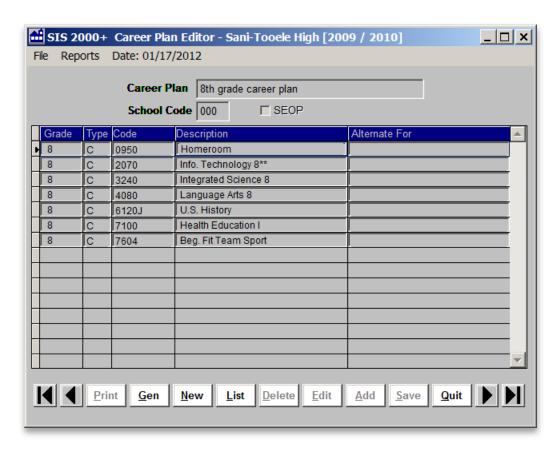| Action	Type	Code	# Students	# Requests Processed	Alternates Promoted/Deleted
Add	Course	8441	1263	1263	
Add	Course	8593	306	306	
Add	Course	8592	335	335	
Add	Course	8676	282	282	
Change	Course	4143	7	6	
Remove	Course	8441	17	0	

End of Report

Career Plan

Career Plan provides a way for you to create mass request rules that are saved so they are ready for year-to-year use. Because courses offered year-to-year change the Career Plan needs to be maintained year-to-year to assure the courses in the plans are valid courses for the active or future tracks.

These collections of courses can be organized around grade level required courses or, as the name indicates, to assemble a set of requests as they relate to particular career pathways. Career plans also identify what set of courses are available as choices to generate requests from a Career Path in SEOP. (Career Plans are used as Career Pathways in SEOP by marking the SEOP checkbox.)

The main Career Plan interface shows a single career plan. You can navigate to additional plans by clicking the left or right arrows at the bottom of the screen or clicking the List button to see the list of all Career Plans.

Create a Career Plan

Click on "New" from the bottom of the screen. A dialogue box prompting you for the name of the career plan pops up. Career Plan names should be well thought out. Groupings by grades should include the grade in the name. Cross grade level request collections should indicate how they work in the name.
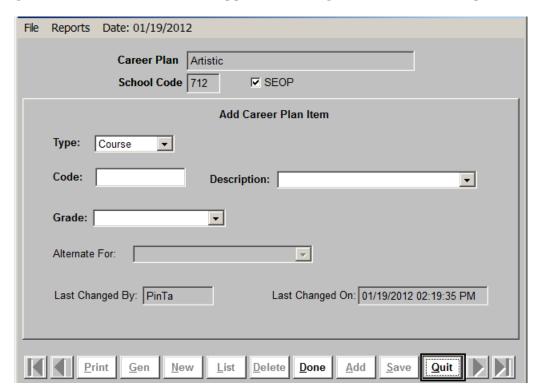
The Career Plan name shows up in the list and dropdown lists in other places in the system. You can organize the career plan requests into many small and simple collections or into large collections containing many course requests across grade levels. We suggest you organize them into functional, clearly named, collections for future ease of use.

Adding Courses to a Career Plan

A Career Plan is made up of multiple courses. Each course is selected from the courses available to the track. You can find them in the Description dropdown list. Pick the course you want to add. Include the grade level the course will be applied. Clicking "Done" saves the request.
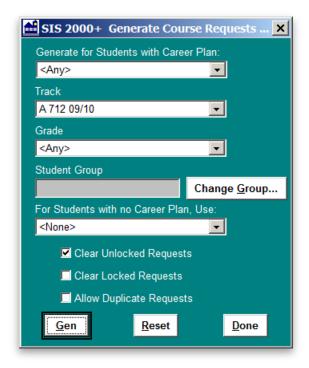

Once you have all the course requests in the Career Plan you are ready to use them to generate requests for students.

Generating Course Requests with Career Plan

Career Plan is a very efficient and useful tool for bulk processing the multiple course requests at one time. Well planned execution is required to achieve your desired results. Once you have all the Career Plans in the system and they are accurate for the current track, you are ready to generate the requests.

Clicking the "Gen" button launches the Generation screen. This screen lets you ensure the requests are generated for the proper set of students.

The selections made for Generating Course Requests are as follows:

Generate for Students with Career Plan – this field is used to select what requests you want to generate based on what has been selected in the Student Editor as a student's designated Career Plan.

> <ANY> - if this is selected, the Generation Procedure will generate the appropriate Course Requests for students with ANY Career Plan designated in the Student Editor. It will not generate for students with no Career Plan designated.

> <NO CAREER PLAN> - if this is selected, the Generation Procedure will NOT generate Course Requests for students with a Career Plan selected in the Student Editor.

'Name of Plan' – if a Career Plan is selected in this field, the Generation Procedure will generate the appropriate Course Requests ONLY for students with the matching Career Plan designated in the Student Editor (See Student Editor Documentation). It will not generate for students with no Career Plan designated.

Track – select the target track that for which Course Requests will be generated. If you are working on Next-Year Mass scheduling, make sure to pick the proper future track.

Grade – select the Grade Level for which to Generate Course Requests.

<ANY> - this selection means that Course Requests will be generated for ANY Grade Level that is part of your selected Career Plan.

<UNSET> - this selection means 'grade level' – if a grade is selected, it will narrow down your Career Plan selection to ONLY generate Course Requests for students in the selected grade. Remember that if you are working on a future track, the students you may be used to working with will now likely be in the next Grade Level.

Student Group – used to designate which group of students you've selected to generate Course Requests for. If a group is selected, the Generation Procedure will ONLY generate requests for students in that group, based on your other Career Plan selections on this screen.

When used with 'Generate for Students with Career Plan', it will only generate Requests for the students who meet that selection criteria AND are a member of the selected group. (i.e., if you select 'General Education' as the Career Plan and then choose a group, Course Requests will only be entered for students who are BOTH a member of that group AND have 'General Education' designated in the Student Editor. Requests will not be generated for students with 'General Education' designated in the Student Editor that is not a part of that group.

When used with 'For Students with No Career Plan, Use', it will only generate Requests for the selected Career Plan, for students who do not have a Plan designated in the Student Editor, AND who are members of the selected group. It will not generate Requests for students who are not in the group.

Change Group… – click this button to make the group selection. It will launch the Group Editor. When you are in the Group Editor, you can select a group by highlighting the target group and clicking Select. Or, you can create a new group at this point and then select that group.

For Students with No Career Plan, Use:- the selection made here defines which Career Plan will be used to generate Course Requests for students without a Career Plan designated in the Student Editor. This is what you would use if your school did not designate Career Plans in the Student Editor for any or all students.

> <NONE> - this selection means that for students with no Career Plan designated in the Student Editor, no Course Requests will be generated. 'Name of Plan' – select the Plan you want to use to generate Course Requests for students with NO Career Plan designated in the Student Editor. (NOTE: selecting a specific GRADE or a specific GROUP to generate Requests for may narrow this selection down.)

> When used in conjunction with 'Generate for Students with Career Plan', this field will allow you to select the same course you selected above to also apply to students with no Plan designated in the Student Editor. (i.e., you can Generate Course Requests for 'General Education' for BOTH students who have that Plan designated AND for students who have no Plan designated. Students with other Plans will not be touched.

> When a Plan is selected in 'Generate for Students with Career Plan', you will only be able to select that Plan or <NONE> from the 'For Students with No Career Plan, Use'.

Clear Unlocked Requests - Check this box to clear out any previous Course Requests in the Course Request Editor program that have been left 'Unlocked'. These might be course requests left over from a previous a Career Plan Generation Procedure (which are entered as 'Unlocked' by default), or manually entered course requests that were designated as 'Unlocked' in the Course Requests Editor. If you are 'building' one Career Plan over another (you want to keep the Requests from both Career Plans), DO NOT check this off or you will lose the previously generated, 'Unlocked' Requests. If you want to re-generate a Career Plan and blow away all of the old Requests that resulted from previous runs of the Career Plan Generation Procedure, DO check this off.

Clear Locked Requests - Check this box to clear out any previous Course Requests in the Course Request Editor program that have been left 'Locked'. These might be manually entered course requests, which are entered as 'Locked' by default. If you want to regenerate a Career Plan after you have manually gone in and added electives through the Course Request Editor, DO NOT select this or you will lose the courses that you entered manually. If you do want to blow away your manually entered Course Requests, DO check this off.
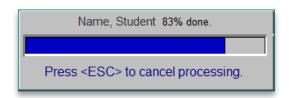
Gen – when you are finished making your selections and are ready to start to "generate" Course Requests Generation Process, click on this. You will be asked if you are sure that you want to begin the process. Confirm that the information displayed is correct and click YES if it is.

Generation Process confirmation dialogue box.

As the Generation Process proceeds, a status bar will be displayed with a percent complete indicator. It also displays the names of each student, as the process generates their Course Requests.

When the process is complete, a new dialogue box will display the total number of Course Requests generated by this run of the Career Plan Generation Process.

Click OK to return to the Generation selection screen.

Reset – resets all of the selections that have been made on this screen. After you run one set of Career Plan Generation selections, you may "Reset", to make a new set of selections, and generate again.

Done – click this when you are done generating Course Requests from the Career Plan Editor and you will be returned to the Career Plan summary screen.
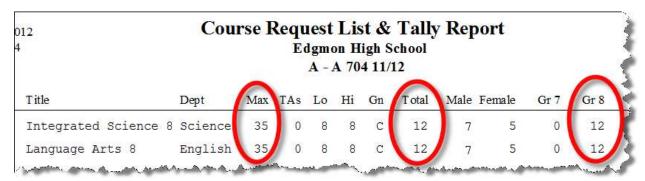
SEOP Course Requests

SEOP can be used to generate requests. In order for SEOP to generate course requests several SEOP specific set up steps are required. Please refer to the SEOP documentation to learn how to use SEOP to allow students and parents to make course request over the Internet. (See the SEOP Documentation.)

Scheduling Course Requests Reports

Several reports reveal the requests needing scheduling. These reports help administrators determine if they have enough resources allocated by the school to accommodate the course demand.

The **Course Request List & Tally Report** shows the maximum number of students the course can accommodate, the number of total request that exist for a course and a breakdown of the requests by grade level.

The **Student Course Request List** gives a student by student list of course requests. This is useful to examine the actual requests, and thus potential schedule, for each student. If this report is run just before loading students into the Master Schedule individual scheduling issues may be caught early. Special needs of students also may be taken into consideration.

Scheduling Course Requests

Student course requests allow schedulers to see the demand for courses before finalizing the schedule structure. Each course request identifies the need of a student to take a course. The cumulative counts of requests make it possible for school administration to make decisions on course offerings to meet student needs.

Both mass scheduling and individual scheduling systems rely on student course requests. Getting an accurate picture of course requests is a key step in the scheduling process. Use the tools mentioned here to create and manage course requests in preparation to scheduling students into the master schedule.