Miami-Dade County Public Schools
Information Technology Services
Technology Learning Center

Building the Master Schedule

Aspen Secondary Scheduling 11th Edition

2020-2021

Contents

Building the Master Schedule

Aspen Build Manual 11.0 (Revision): January 7, 2020

Introduction

This tutorial is designed specifically for Miami-Dade County Public Schools. It provides a logical sequence for building a master schedule.

Rights and permissions are granted through the QUAD A system. Administrators must issue only the highest single authorization.

Permissions

RIGHTS	DESCRIPTION	SV	BV	MASTER	SUB. SELECT
WSHA	Administrator; Full rights	YES	YES	YES	YES
WSHB	Registration/ Scheduler; Posted Sched. Control; Print/View Reports	YES	NO	NO	NO
WSHR	Batch Student Request **Entry Only***	NO	YES*	NO	YES
WSHO	View Only	YES	NO	NO	NO
WSHX	Student Schedule; Edit	NO	YES	NO	NO

Logging on to Aspen

Access Aspen through the employee portal under the Applications and Sites tab.

Navigation

The School view, color coded blue, is designed for the maintenance of the schedule once it is built. (See the Appendix.) The Build view is used to build a schedule for the new school year.

Aspen uses a combination of menus and tabs to move to different parts of the program.

A Settings bar at the top right corner of every screen allows users to Change View, Set Preferences, and Log Off.

This book uses a shortcut key for accuracy and conciseness. For example, **BV**, **TT: Student**, **ST: Requests** means switch to

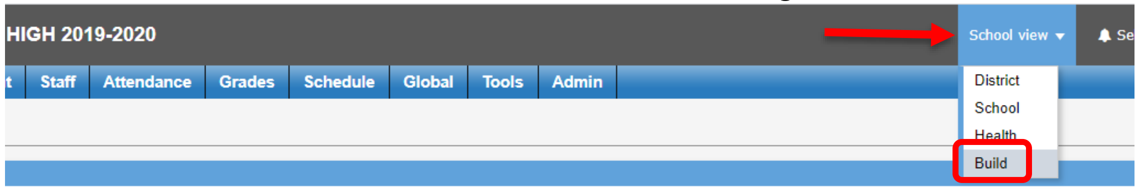
Tab Abbreviations

Shortcut KEY		
	BV	BUILD VIEW
	SV	SCHOOL VIEW
	TT	TOP TAB
	ST	SIDE TAB
	SbT	Sub Side Tab

The following are instructions for starting the new build year. These instructions do not eliminate the need to use the full Aspen Build Manual. Access the full manual from the Resource Library on the Aspen homepage.

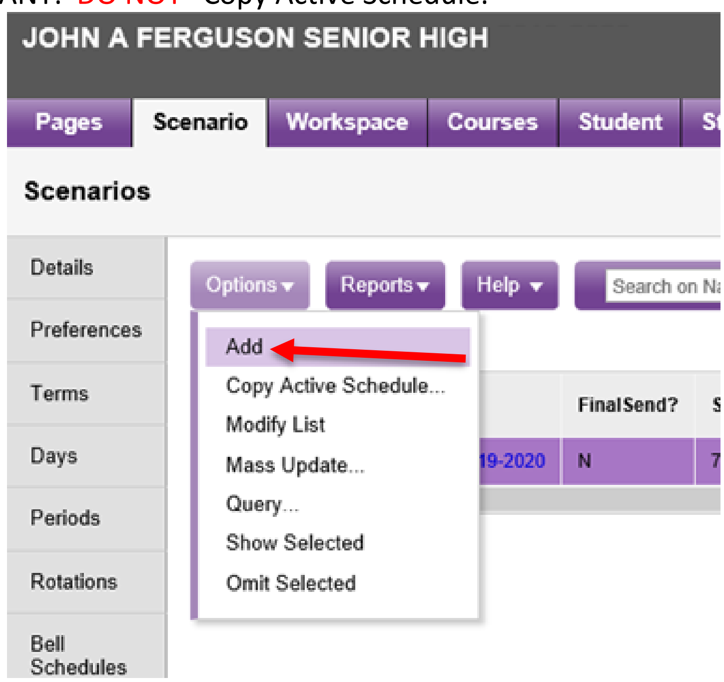
STARTING THE NEW BUILD YEAR

- **STEP 1:** Build View: Select the *Build* from the Settings Bar.



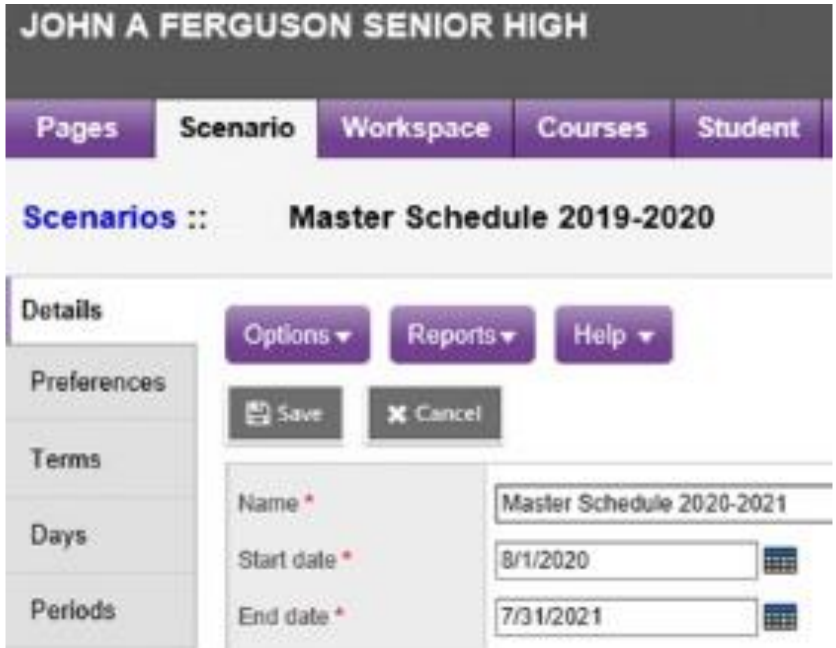
- **STEP 2:** Verify that the top left title in the Build View (BV) contains your school name and the **next school year, (2020-2021)**. (If no tabs appear, your Build View has not yet been activated. Submit a HEAT incident to have your Build View activated if your future courses have been added to DSIS.)

- **STEP 3A:** Add a new scenario: *TT Scenario / Options -> Add*. IMPORTANT: DO NOT "Copy Active Schedule."

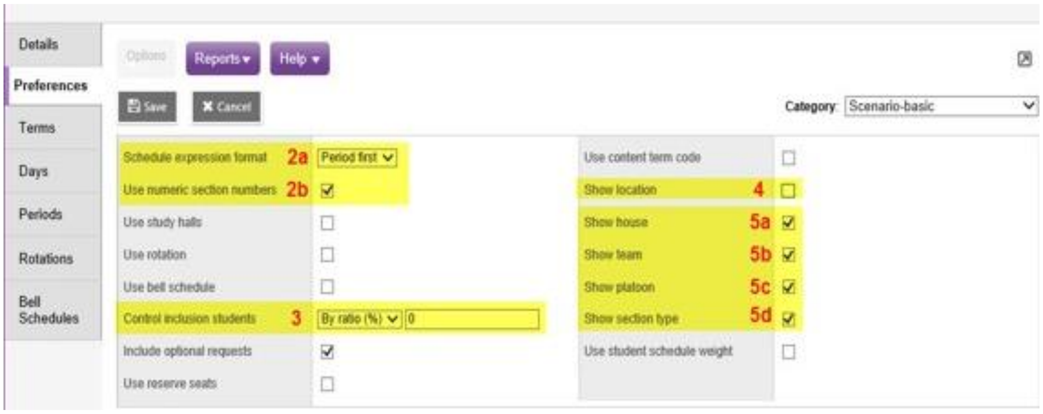


- **STEP 3B**: A "New Schedule" window will open that requires the following information:
    - Enter the name for the new scenario:
      Master Schedule 2020-2021
    - The Start and End dates should already be populated based on Aspen's District Calendar and contain the entire year (including non-school days). Do not enter start and end dates for the 180-day school year. You will enter the Term Dates in Step #8 below. The Start and End dates are as follows:
        - **Start: 08/01/2020**
        - **End: 07/31/2021**

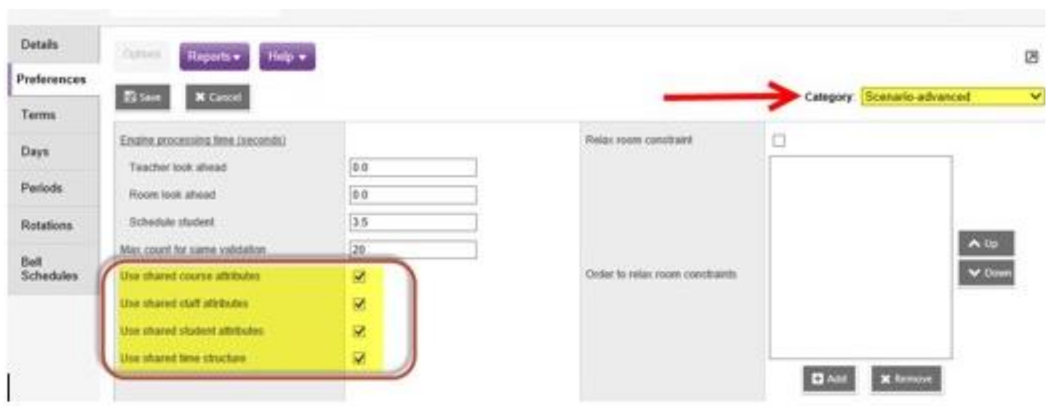
- Optional: Use the comment sections to make notes about the scenario.
- Click **SAVE**. The application will initialize the course, student, and staff attributes.



- **STEP 4:** Complete the scenario detail: *TT Scenario / ST Preferences.*
  1. The Category drop-down list on the right defaults to *Scenario-basic.*
  2. On the left side, you ***must select*** the following:
     a. Schedule expression format: **Period first**
     b. **“Use numeric section numbers”** must be checked
  3. On the bottom left, leave the Inclusion ratio % field set to 0 (zero).
  4. De-Select “Location.”
  5. The following items are optional and are not used in all schools. Select only the items your school plans to use. Uncheck all unused items on the right column to eliminate unnecessary columns on your screens.
     NOTE: These options can be changed at any time during the scheduling process.
     a. Show house
     b. Show team
     c. Show platoon
     d. Show section type
  6. Click SAVE before leaving the screen to save your new scenario.



7. Change the Category drop-down to Scenario-Advanced. Check all the “shared” attributes flags (flags on) **<u>before</u>** you begin working on the scenario. These must remain checked for the duration of the scheduling process. Leave all “Engine processing times” at the pre-set values. Click **SAVE**.
   Note: The shared options may be changed in copies of this original scenario as needed. See the Aspen Build Manual for details on copying scenarios and “data shared across scenarios.”



8. Continue the build process using the Aspen Build Manual available from the Group Resources located on the Aspen homepage to complete the following actions:

a. Secondary school scenarios must have three Terms (Annual, Term 1, and Term 2).
b. Elementary school scenarios must have one Term (Annual).
c. Set Term Dates: Please visit http://www.dadeschools.net/calendars
d. Set Days (one day)
e. Set Periods

DATA SHARED ACROSS SCENARIOS

NEVER SHARED:

- The entire Workspace (all sections, when they are offered/prescheduled, teacher assignments, etc.)
- Rules

When you create a new scenario, you may copy any of the items above into the new scenario, but thereafter they are completely separate and changes in one scenario do not affect any other scenario.

ALWAYS SHARED:
Any change to any of the following *will* impact ALL scenarios.

- Patterns & Pattern Sets
- Student requests
- Rooms (the settings for each room such as department & max capacity)

OPTIONALLY SHARED:

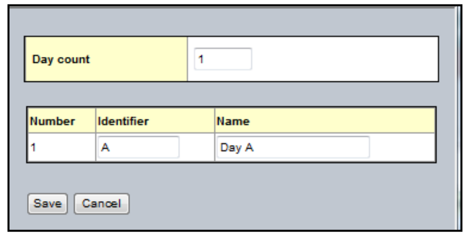
When you create a new scenario, **by default** the following attributes are set to be shared. **You must specifically uncheck these boxes** to be able to change something in one scenario only.

- Course Attributes (include in scheduling, max enrollment, base terms, etc.)
- Staff Attributes (include in scheduling, preferred room, max-in-a-row, etc.)
- Student Attributes (include in scheduling, team, unavailable schedule)
- Time Structure (terms, days, periods)

BE ADVISED: We suggest that you request assistance for the first scenario copy.

Defining Schedule Days

While Aspen can support schedules with multiple days, DSIS cannot. We will create a one-day schedule.



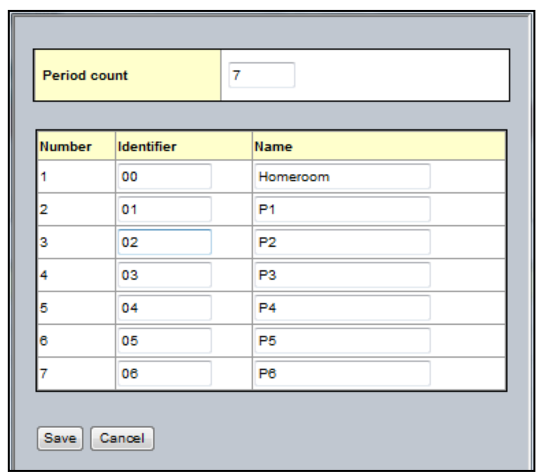
- Step 1: Go to **<u>BV</u>, <u>TT: Scenario</u>.** The list of scenarios appears.
- Step 2: Select the scenario you want to work with, and click the *Days* Side Tab.**(<u>ST: Days</u>)**
- Step 3: Pull down the *Options* menu to click *Add*. The Add Day dialog box appears
- Step 4: At the *Day count* field, type the number one (1) in the schedule scenario, and then press the Tab key. The dialog box displays the appropriate number of rows, with each row representing one day.
- Step 5: Type the letter "A" in both the *Identifier* and *Name* boxes.
- Step 6: Click *Save*.

NOTE: Information will come forward next year.

Defining Periods

Define the number of periods in your schedule.

- Step 1: Go to **<u>BV</u>, <u>TT: Scenario</u>.** The list of scenarios appears.
- Step 2: Select the scenario for which you want to define periods.
- Step 3: Click **<u>ST: Periods</u>**.
- Step 4: Pull the *Options* menu to *Add*. The *Add Period* dialog appears.



- Step 5: In the *Period count* field, type the number of periods in this schedule scenario, and then press the Tab key. The dialog box displays the appropriate number of rows, with each row representing a period.
- Step 6: For each period, type an identifier* (period number, e.g. 01) in the *Identifier* column.
- **Period identifiers must not contain any letters; <u>DSIS will reject period identifiers that contain letters</u>.*

HINT: Middle schools can identify their HR as Period 00 and place it at the end of the number order to preserve the consecutive nature of the periods. Senior High Schools may use 09 at the end for the same purpose.

NOTE:
Do not use the *Rotations* or the *Bell Schedules* side tabs.

- Step 7: For each period, type a name (period name, e.g. 01) in the *Name* column.
- Step 8: Click *Save.*
- Step 9: Select the period number from the Period side-tab and click Details. Then, select the *Is scheduled* check box to make each period available for scheduling purposes.

Middle schools should create a *period 00* (period number) to use as their Homeroom (period name) in addition to their six academic class periods.

Defining Schedule Patterns

In Aspen, schedule patterns represent the different ways course sections meet in your school's schedule. Schedule patterns include homeroom classes, normal classes, and classes that use multiple periods (e.g. work experience and Project Victory).

- Step 1: Go to **BV**, **TT: Global**, **ST: Pattern Library**
- Step 2: Pull the *Options* menu down to *Add*. The New Schedule Pattern page appears. In the area at the top of the page, you define the shape of this pattern.
- Step 3: On the top right, below *Explode pattern on save*, select the *By period* and *By day* checkboxes if you want the system to create every possible pattern based on the pattern you create in the grid.

Field	Data Entry
Days	1 (already entered)
Periods	total number of periods in your school day (already there)
Terms	**Select: Do not use**
Schedule Pattern Type	Flat (Choose "Flat" from the dropdown menu.)

- Step 4: In the grid, click the boxes that represent Day 1 and Period 1 of this schedule pattern.
- Step 5: After you identify the pattern, click *Save*. If you selected to explode the pattern, the system uses the one period/day combination that you map on the grid to create every possible matching pattern within the schedule.
- Step 6: Click *Save*.

- Step 7: Click the **Pattern Library** side-tab to view all the patterns. The total number of periods defined should match the number of periods you specified on **BV, TT: Scenario, ST: Periods**.

Creating Pattern Sets

Group your patterns into pattern sets that apply to the different meeting shapes of courses.

- Step 1: Go to **<u>BV</u>, <u>TT: Global</u>, <u>ST: Pattern Sets</u>.**
- Step 2: Pull the *Options* menu to *Add*. The *New Schedule Pattern Set* page appears.
- Step 3: Define the name of the pattern set(s) for your school. See the chart below for suggested Pattern Set names. Repeat as needed.
- Step 4: Click *Save*.
- Step 5: After naming your pattern sets, you must tell the scheduler, what patterns are in each set. On the *Pattern Sets* side-tab, click the first *Pattern Set* name.
- Step 6: Click the Sub-Tab *Patterns.* **(<u>SbT: Patterns</u>)**

Pattern Set Name	Periods/Patterns Used
Homeroom	Period 00 for Primary or 09 for Secondary
Class	Periods 1- n (n=number of periods in your day)
AM Class	Periods 1-3 (Project Victory and OJT)
PM Class	Periods 4-6 (Project Victory and OJT)

NOTE: After completing your first schedule, another scenario can be started. Copying a completed schedule lets you take advantage of work already completed.

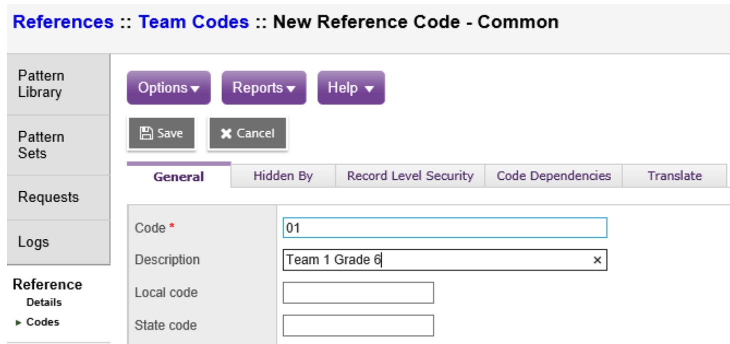
- Step 7: Pull the *Options* menu to *Add*. The *Schedule Pattern Pick List* appears.
- Step 8: Change the *Pattern Type* to *Flat*. **NOTE**: Ignore *PPC*; leave it blank
- Step 9: Select the patterns you want to add to the pattern set, and click *OK*. **Be careful! I**f you are in a middle school, the first pattern in this list is for your Homeroom (00) period.
  (See I. C. 3. above.)
- Step 10: Click *Save*.

CREATING TEAMS

NOTE:
Teaming is a highly restrictive scheduling methodology and often reduces a student elective choice.

Teams group students together while building the master schedule, and later when loading students into the classes. We recommend allowing the system to randomly assign students to teams, but you can pre-assign each student to a team if desired.

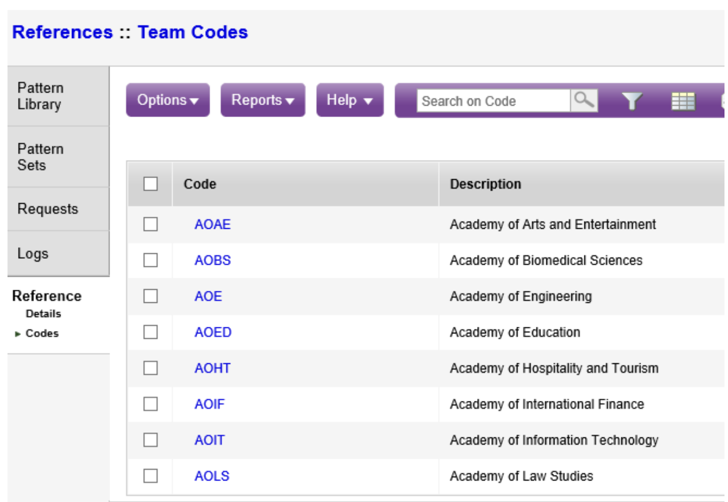
At this time only create team reference codes (team names) to be used later in the scheduling process.



- Step 1: Go to **BV**, **TT: Global**, **ST: Reference**.
- Step 2: Select the checkbox next to ***Team Codes.***
- Step 3: Click **SbT: Codes** (under the Side tab **Reference**).
- Step 4: Under the *Options* menu click *Add*.
- Step 5: Define the team code.
- Step 6: Click *Save*.
- Step 7: Repeat steps 4—6 for each team code you want to create.

NOTE:

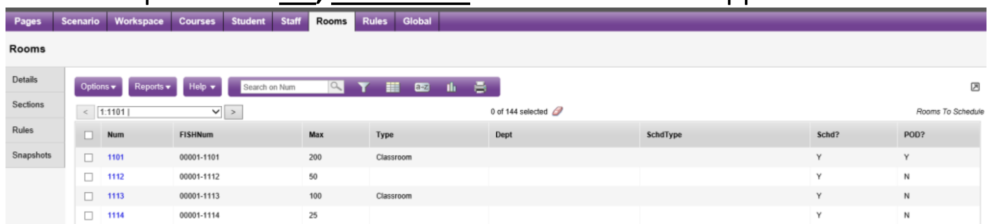
After you have created sections, these codes will appear as a dropdown list in the *Team* field for each section of a sequence.



Rooms

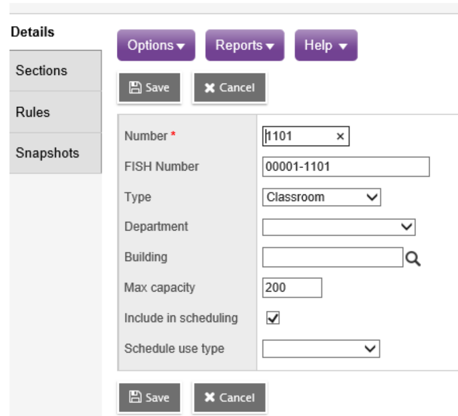
Before you build a master schedule, you must verify your room numbers and set scheduling parameters, using the chart below for reference.

- Step 1: Go to **<u>BV, TT: Rooms</u>**. The list of rooms appears.



NOTE: FISH numbers come from DSIS. FISH room numbers that are matched to an DSIS room number will appear in the room list.

- Step 2: Click on the room to be defined. The Details dialog opens.
- Step 3: Set the parameters using the table below
- Step 4: Click on the *Save* button.



You may add rooms, but only valid FISH room numbers will be exported to DSIS. Before adding a room, switch the filter to "All Room" and <u>avoid duplicating rooms</u>. Duplicate rooms will generate validation errors in the last phases of the scheduling process.

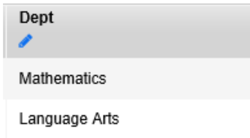
ALERT:* *When using the Modify List, do not display more than 20 records per page.

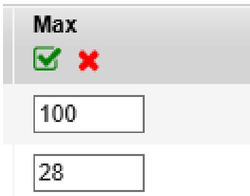
- Step 1: Go to **<u>BV, TT: Rooms</u>**. The list of rooms appears.
- Step 2: Pull down the *Options* menu to *Modify List.* The pencil icons appear.
- Step 3: Click on the "pencil" icon to activate the data entry cells within the selected column.
- Step 4: Once you have entered the data into the open cells, click on the green check mark to save any changes to the column.

Field	Data
Number	Room number
Department	Department that uses it (*Optional*).
Building	Building number it is in (*Optional*).
Max Capacity	Maximum number the room can hold (*per period*).
Include in Scheduling	Checkmark. **NOTE:** Take off rooms you will not or cannot use.
Schedule Use Type	• Blank (*default – preferred setting*) • Department Only • Always Free (i.e.; gym, cafeteria, field, library, etc.)

NOTE: You can modify the information in any column where the pencil appears.

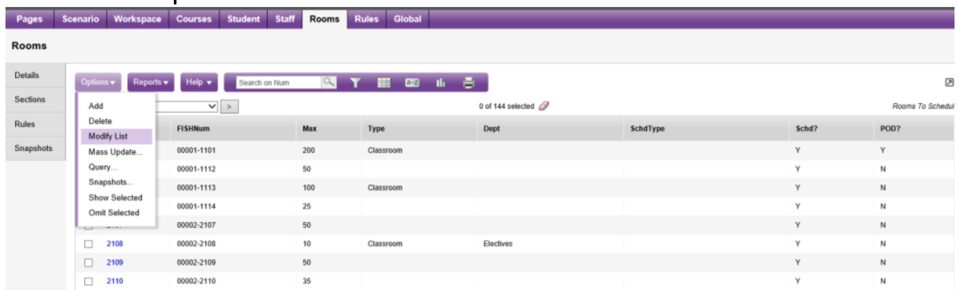
Modify List

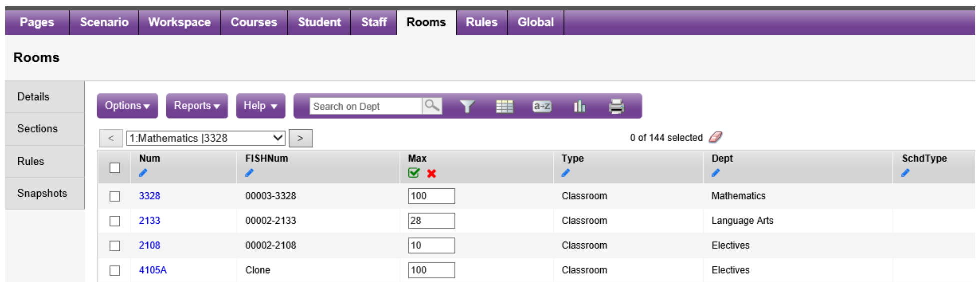




Otherwise, any data entry will be lost upon exiting this page. If you wish to cancel the changes, click on the X at the top of the column.

When you have finished entering data on your rooms, run the Room Attributes report.





Classroom Schedule Attributes Report

Go to **BV**, **TT: Rooms**. Pull down the *Reports* menu to *Classroom Schedule Attributes* to check your work.

Clone Rooms

NOTE:
Clone rooms will be rejected by DSIS. Prior to sending the schedule to DSIS, you must change the room numbers back to the original matched DSIS room number.

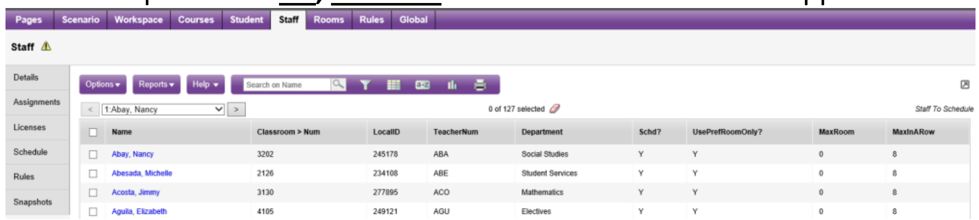
Since the scheduler will only schedule one teacher in one room with one section, you may need to create clone rooms temporarily to accommodate more than one section in the same room at the same time, e.g. a locker room or a gym or auditorium.

- Step 1: Go to **BV, TT: Rooms**.
- Step 2: Pull the *Options* menu down to *Add*.
- Step 3: Create a room number that reflects the room's clone status, e.g. for a locker room labeled 600, create clones 600A, 600B, and 600C.
- Step 4: Enter the room information following the table on Page 10 above.
- Step 5: Use the room in your schedule as needed.

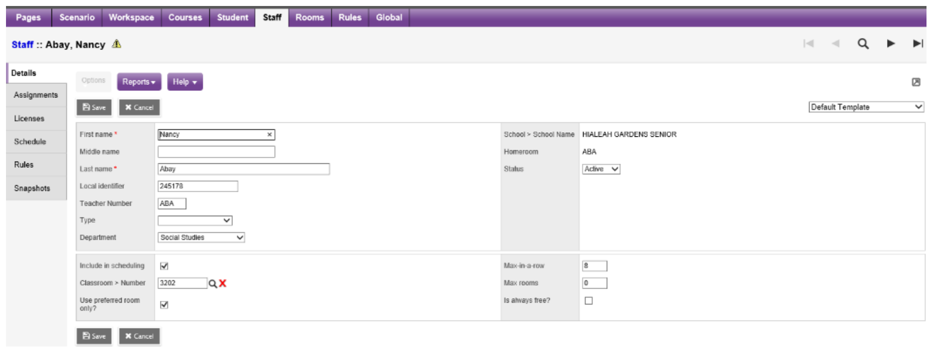
Staff

Verify that all your teachers came in correctly, and then set scheduling parameters for teachers.

- Step 1: Go to **BV**, **TT: Staff.** The list of staff members appears



- Step 2: Select the teacher and click on the name **or** click on **ST: Details**.



REMINDER:

Modify List is another alternative method to enter data as previously shown.

- Step 3: Enter each parameter (use the reference table below):
- Step 4: Click *Save* before exiting the screen.

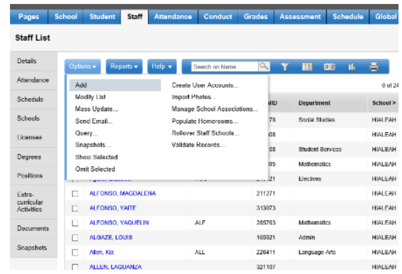
Field	Data
Included in Scheduling	Checkbox if you want the system to schedule this staff member
Classroom Number	The staff member's preferred classroom
Use Preferred Room Only	Checkmark if the system must assign this teacher to the room you select at the Classroom number field.
Max-In-A-Row	Maximum number of classes a teacher can teach in a row without a planning period.
Teacher Num	Teacher's 3-letter code.

Teacher Schedule Attributes Report

When you have finished entering data on your staff, run the Teacher Attribute Report.
Go to **BV**, **TT: Staff**. Pull down the *Reports* menu to *Teacher Schedule Attributes* to check your work.

Adding a TBA

Create TBA teachers as necessary ***only for vacant, authorized open*** positions. Only under these conditions may a TBA be scheduled. The TBA's last name ***must*** include the Position Control number, for example "*TBA Alg #53036668*. Or *TBA Rdg* #53036668"



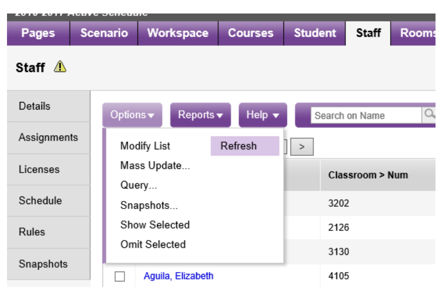
- Step 1: Switch to School view
- Step 2: **SV/TT: Staff**
- Step 3: Menu, Options > Add
- Step 4: In the last name field, enter the subject area for the TBA. Add a number after the subject in the event that more than one is needed:

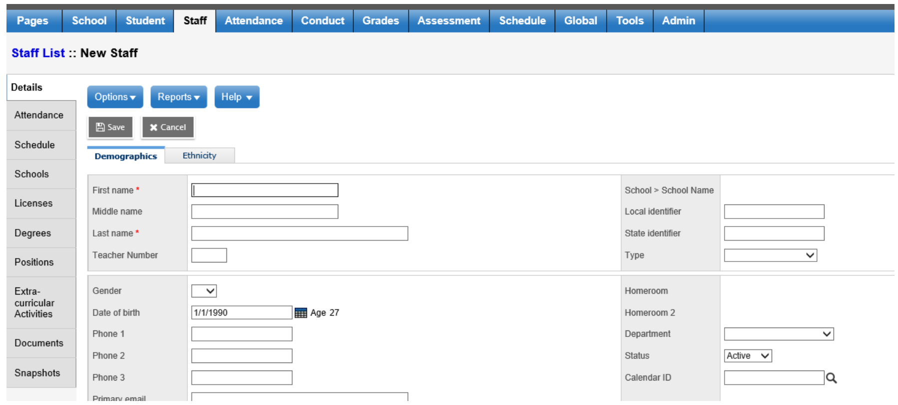
  Example: TBA,Science2

- Step 5: Enter TBA on the space provided for the Last Name and in the space for the Teacher Number.
- Step 6: Select the department that will receive the TBA
- Step 7: Click on the save button on the top or bottom of this window

Repeat as needed to create additional TBAs.

- Step 7: Switch to the Build View and click on the Staff (TT)
- Step 8: On the Options menu, click on "Refresh."



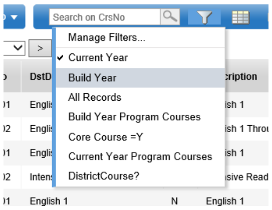


Any TBA(s) created in School View become part of your Staff list in Build View and can be assigned to sections, after the BV Staff list is "refreshed." TT Staff / Options -> Refresh.

Warning!

WARNING: **<u>No actual teacher's name should be manually added to the database</u>**. Newly hired teachers are added automatically to Aspen via nightly updates. If the staff member you are searching for does not appear in you Staff list, please change your filter to "All Records" to be sure he/she is not in your list. Create a TBA if necessary and substitute the proper teacher after they have appeared in your list. If you are going to schedule a teacher who will join your staff *next* year, please submit a Self-Service request to have ITS add the teacher to your staff list.

Courses



All courses are created in DSIS first and transfer into Aspen overnight. The nightly update does not include term indicators. The morning after the course creation, verify that the courses transferred correctly and then add the information that the scheduler will need to create your master schedule. *Again, use the "**Refresh**" command (TT Course/ Options -> Refresh) to refresh in courses newly added to DSIS.*

WARNING: DO NOT "REFRESH" THE COURSE CATALOG.

Adding Departments

SV, TT: Schedule, ST: Courses

This table is the list of all the courses in your school.

NOTE: If you intend to work on your courses for the next school year, make sure you change the filter to the *Build Year*.

HINT: Use Ctrl + F

After you check that the list contains all the courses you need, add the additional data you will need to create a schedule. You can add data on the main list by pulling down the Options menu to Modify List.

- Step 1: Click on the pencil at the top of the "Department" field. The field immediately shows text boxes and a magnifying glass indicating that a pick list is available to choose a department.
- Step 2: Click on the magnifying glass to open the pick list.
- Step 3: Navigate to the proper department and select it by clicking its radio button. (You can use Ctrl + F to find a department quickly.)
- Step 4: Click OK at the bottom of the dialog.
- Step 5: Repeat steps 2—4 for all courses.
- Step 6: When finished entering data in the field, click the green checkmark at the top of that column to save your work

Updating Additional Course Details

NOTE: This is *not* the place to limit enrollment *for individual sections*; this entry is *only* for the entire course. (To place a max on the sections, see below.)

SbT: Details

- Step 7: Click on the *Details* Sub Tab
- Step 8: Verify that the Master Type for each *academic* sequence is "Class." This is the only type that will be sent back to DSIS. [If your school has them, other choices that can be scheduled are "Duty" and "Package."]
- Step 9: *Optional*: Enter the "max requests" (on the top right) if desired. This limits the number of students who can request a course on a frist-come, first served basis.

This is *not* the place to limit enrollment *for individual sections*; this entry is *only* for the entire course. (To place a max on the sections, see below.)

- Step 10: Click the save button.
- Step 11: Repeat steps 8—10 for all courses.

The following set up must be completed before you attempt to load students into your completed master schedule.

Working with Alternates

The batch entry screen for student requests eliminates the need to enter one-to-one course-to-alternate course matching on individual students. Students' requests are applied automatically based on course information. The following set up the configuration of courses and control how substitutions are made. For example, you will want to ensure that Fabrics and Fibers is not substituted for an English class.

New Field Set

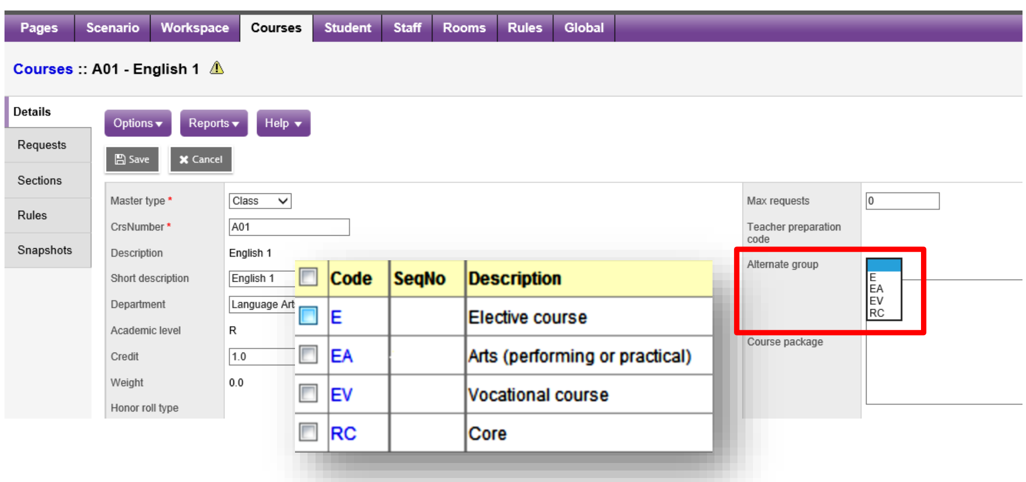
NOTE:
To reduce the incidence of conflicts, determine which courses will be considered "Alternates" prior to initiating the process.

Defining Course Information

- Step 1: Set courses to allow substitutions (or prevent) substitutions: ***In BV / TT Courses / ST Details: Are subs allowed?***
- Step 2: Select the field set called Alternate Courses to set up alternate courses.
- Step 3: Check the box to allow substitutions for this course
- Step 4: Un-check the box to prevent substitutions for this course
- Step 5: This field can be mass updated.

Once a course is set to allow substitutions, you must set its Alternate Group code. The grouping determines which courses are exchangeable. For example, you may want Fabrics and Fibers to be substituted for Ceramics; if so, they must both have the same Alternate Group code (e.g. elective).

ALERT:
The "Alternate group" selection is essential in ensuring that the scheduling engine recognizes a course as an "Alternate."



(There are four Alternate Groups.)

New Student Course Request Field

Set the Alternate Group code for courses that may be exchanged or substituted for others, to ***SV / TT Schedule / ST Courses / subT Details*** and select one of the options from the dropdown list.

Three filters have been created to help you set up your courses using the Alternate Courses field set:

- Are Subs Allowed? (wildcard filter to show courses set to either true or false)
- Alternate Group Code? (wildcard filter with drop down list to choose specific Alternate Group code)

- Alt Courses w/out AltGrp Codes (finds courses set to allow subs that are missing a group code)

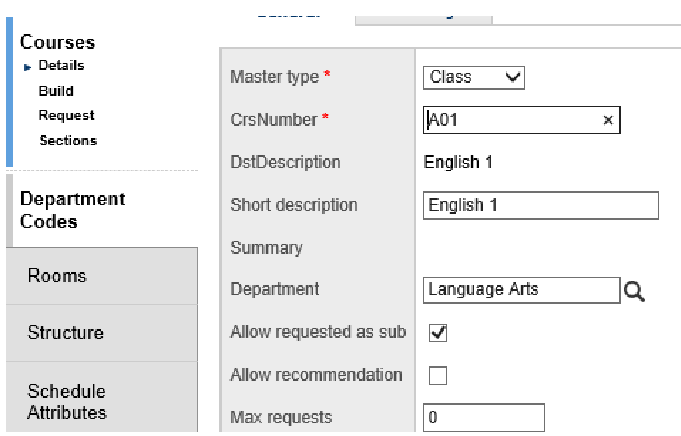
Additionally, the student request screen has been altered to include a new field (*Alternate?*). This field shows which courses are alternates. Courses entered in the Alternate columns on the batch entry screen will show with a Y in this field.

SchoolCourse > CrsNo	School > SchoolName	SchoolCourse > Description	Alt 1 > CrsNo	Alt 2 > CrsNo	Alternate?	AltType	SchoolCourse > Credit
A10	HIALEAH GARDENS SENIOR	English Honors 1			N		1.0
B13	HIALEAH GARDENS SENIOR	Algebra 2			N		1.0
C17	HIALEAH GARDENS SENIOR	Research 1 {Local Honors}			N		0.5
C18	HIALEAH GARDENS SENIOR	Chemistry 1 Honors			N		1.0
D07	HIALEAH GARDENS SENIOR	AICE International History 1 AS Level			N		1.0
I07	HIALEAH GARDENS SENIOR	Personal Fitness			N		0.5
M01	HIALEAH GARDENS SENIOR	Health Science Anatomy & Physiology/Level 3			N		1.0
M41	HIALEAH GARDENS SENIOR	Veterinary Assisting 1/Level 3			N		1.0
N03	HIALEAH GARDENS SENIOR	Spanish for Spanish Speakers 3 Honors			N		1.0
P03	HIALEAH GARDENS SENIOR	Fitness Lifestyle Design			N		0.5

- When alternates are entered through the batch entry screen (in BV), they will appear in this column with a Y. There is no need to enter anything in the Alt1/Alt2 columns because the Alternate Course codes will trigger substitutions if required.
- When entering student individually you may enter one-to-one alternates, using the columns labeled Alt1 and Alt2 if desired.
- Only one method of entering the alternates is required.

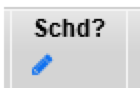
Facilitating the Batch Entry Process

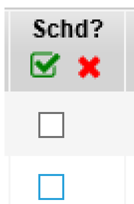
In SV, you may have set your courses to "*Allow requested as sub*." This does not facilitate the use of alternate courses when you load students into a completed master schedule. It allows the entry of alternate requests via the batch.



Defining Course Scheduling Parameters

NOTE: Make sure you change the filter to show courses for the *next* school year, i.e. the *Courses to Schedule*.



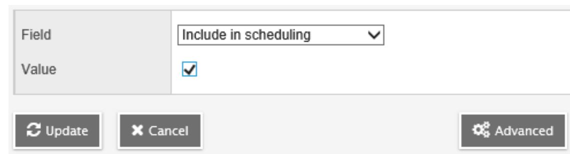


NOTE: *Setting Base and Covered Terms determines if a course is an annual or a semester course, but it does not specify the term indicator (term in which the course is taught). Term indicators are set at the section (class) level.*

<u>BV</u>, <u>TT: Courses</u>

This is a list of all the courses you entered into DSIS for the next school year. Add the data you will need to create a schedule. You can add data here on the main list by pulling down the *Options* menu to *Modify List*.

- Step 1: Click on the pencil at the top of the *Schd?* field. Check boxes appear in this field for each course.
- Step 2: Click the checkbox for each course you are going to use in your schedule.
- Step 3: When you are finished, click the green checkmark at the top of the column to save your entries.
- Since you will use all or most of the courses in this list for your new schedule, you can mass update this field to "Y" by pulling the Options menu down to *Mass Update*. In the dialog that appears, select *Include in Scheduling*? from the dropdown menu and place a check in the checkbox. When you click the *Update* button, all courses will have a "Y" in this field.



- Step 4: Click on the first sequence number in the list. The sequence number is a link that opens the *Details* Side Tab. In the bottom half of the dialog, note that the course already has a checkmark in the *Include in Scheduling?* field from the first three steps above. The "Sections Scheduled" will be zero at this stage since you have not set sections yet.
- Step 5: Leave the *Load Priority* at zero. This is the highest priority.

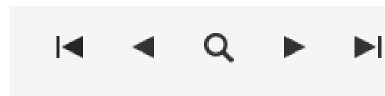
COURSE	BASE	COVERED
A	1	1
T1	2	1
T2	2	1

In the next section, you will learn more about prioritizing courses.

- Step 6: Set *Base terms per year* 1 for an annual courses, 2 for a semester course.
- Step 7: Set *Covered terms per year* to 1.
- Step 8: Set *Periods per cycle* to 1 since you will be creating a "flat" schedule where every day looks like Monday. Courses that take up more than one period will have a larger number here.
- Step 9: Choose a *Schedule Pattern Set* from the dropdown list. (These Pattern Sets you created when you set up your Scenario earlier. <u>BV</u>, <u>TT: Global</u>, <u>ST: Reference</u> > Master Schedule Type,

SbT: Codes). Your choice will determine how and when the build is allowed to schedule this class.

- Step 10: If a course must be followed by another particular course, e.g. government/economics, choose the next course's sequence number from the list in the *Course Bind Next* field. **NOTE**: course to follow must have the same teacher and the same number of sections.
- Step 11: In the right column of the dialog, set the *Section Enrollment Max* to the right class size.
- Step 12: Repeat steps 4—11 for all your courses. You can move to the next sequence by using the navigation (VCR) buttons at the top right side of the dialog.



- Step 13: Click the *Save* Button to keep your changes.

Mass Assigning a Pattern Set to Courses

NOTE: Remember to change the filter back to *Courses to Schedule.*

- Step 1: Go to **<u>BV</u>, <u>TT: Courses</u>.**
- Step 2: Select the courses to which you want to assign a pattern set
- Step 3: Pull down the *Options* menu to *Show Selected*. The window shows only the courses you selected.
- Step 4: Pull down the *Options* menu to *Mass Update*. *The Mass Update* dialog appears.
- Step 5: Using the dropdown menu, change the *Field* setting to *Schedule Pattern Set*.
- Step 6: At the Value field, click on the magnifying glass to bring up the pick list for the schedule patterns.
- Step 7: Click on the button of the appropriate schedule pattern.
- Step 8: Click *OK.* You return to the Mass update dialog.
- Step 9: Click the *Update* button on the Mass update dialog.
- Step 10: Click *OK* to confirm the update action.
- Step 11: Read the confirmation message. If it is accurate, click the *OK* button. The update of the selected courses occurs. Your list is now showing your custom selection.

Course Load Priorities

Course Load Priorities allow you to specify which courses should be considered first by the scheduling engine. Suggested course load priorities are as follows, but can be modified to suit individual school needs.

HIGHLY RECOMMENDED

Course Load Priorities can be updated individually through the **<u>BV</u>**, **<u>TT: Courses</u>**, **<u>ST: Details</u>**, but it will be easier to select <u>all</u> courses in a particular group and mass update them.

Course Type	Load Priority
Core Courses	1
CRRP Language Arts & Reading	5
AP, AICE, IB	10
Honors	20
Academics	30
Electives	40

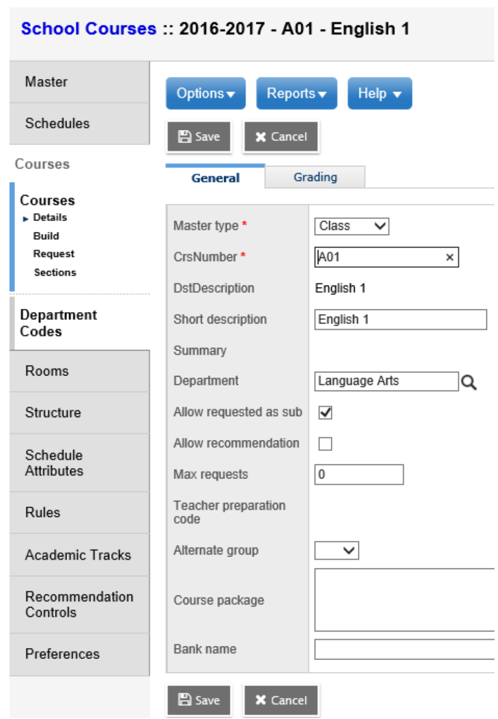
WARNING: Always read any warning screens when using Mass Updates. There is no "UNDO!"

- Step 1: Go to **<u>BV</u>**, **<u>TT Courses</u>** and Select desired courses.
- Step 2: Pull down the *Options* menu to *Show selected*. Verify the number of courses selected is correct.
- Step 3: Pull down the *Options* menu to *Mass Update*.
- Step 4: Use the dropdowns to select *Course Load Priority* See chart at right for suggested load priority values.
- Step 5: Enter the desired priority number.
- Step 6: Press *OK*.

Defining a Course Package

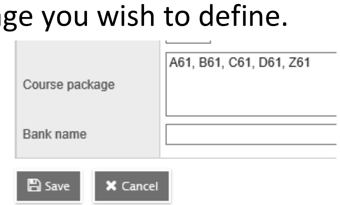
A package contains a pre-determined set of requests that can be added to a student, using a single sequence. The system administrator has defined nine generic packages. Each school defines the course content of selected package(s). The package is used to speed data entry of student requests. To use a package, it must first be added to your list of courses from the district catalogue.

- Step 1: To add a package to your school, go to **SV, TT: Schedule, ST: Courses**.
- Step 2: Pull the *Options* menu to *Add.* The Course Pick List appears.
- Step 3: Change the *Course Catalog* field to display the correct dates for the next school year.
- Step 4: Change the *School Level* to "*All*" to display a list of all district courses.
- Step 5: Use Ctrl+ F to find the packages. (E.g. Package PK2.)
- Step 6: Checkmark the package(s) you wish to add to your school course list.
- Step 7: Click the *OK* button.



Expanding Packages

- Step 1: Go to **SV, TT: Schedule, ST: Courses.**
- Step 2: Switch the filter to the next year (build year).
- Step 3: Use Ctrl F to find the package(s) available in your list.
- Step 4: Click on the name of the package you wish to define.
- Step 5: The *Details* Sub-Tab opens.
- Step 6: Click in the *Course Package* field.
- Step 7: Type the Sequence numbers of all the sequences you want this package to hold separated by commas. (See example.)
- Step 8: Click the *Save* button.
- Step 9: Repeat steps 4—8 for all packages required at your school.



IMPORTANT: When you have entered ALL student requests, you must expand all the packages by going to **BV**, **TT: Global**, **ST: Requests.** Pull down the *Options* menu to *Expand Packages*.

> **NOTE:** You must collapse all packages before making a change to any package.
>
> **NOTE:** When you have finishing entering parameters for all your courses, run the *Course Schedule Attributes* report. Go to **BV**, **TT: Courses** and pull down the *Reports* menu to *Course Schedule Attributes*.

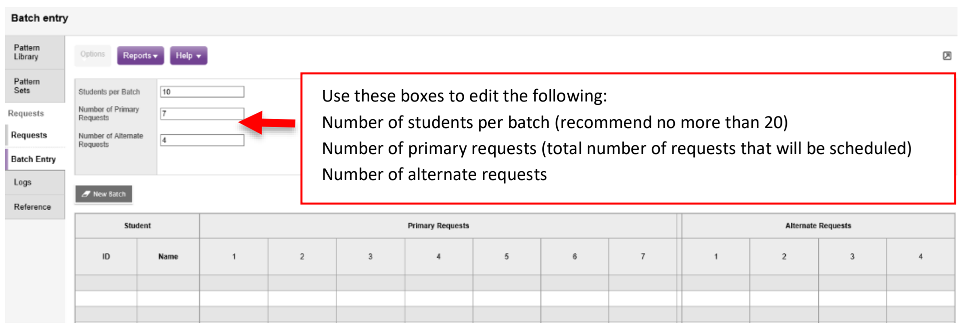
Batch “Mass” Entry of Student Requests

X2 Aspen student scheduler now accepts the mass entry of student requests a batch at a time. This feature allows you to enter multiple requests for multiple students at one time including their alternate requests.

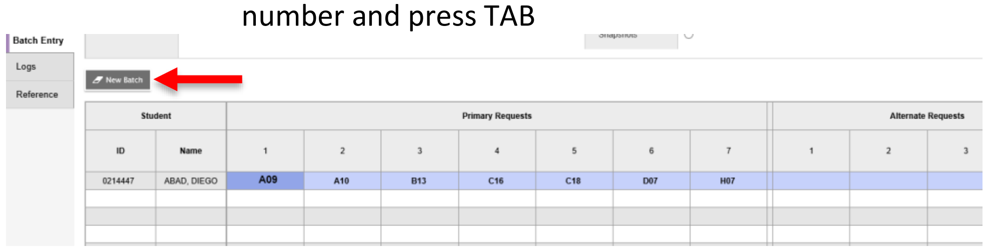
BV / TT Global / ST Requests / subT Batch Entry

Set the form preferences for your school. Edit the following in the top of the Batch entry window:

- Set the number of students per batch (recommend no more than 20)
- Set the number of primary requests (total number of requests that will be scheduled)
- Set the number of alternate requests (maximum number students may specify)



- Step 1: Click the student ID cell to enter the student ID number and press TAB



- Step 2: Type the first request sequence. Tab to subsequent cells to enter the rest of the student’s requests.
- Step 3: Enter the student’s alternate requests in priority order. Each request is saved automatically when you tab to the next cell. There is no save button for this feature.

Continue until the batch window is full of students and their requests. When the window is full of students and their requests, press the “New Batch” button to display an empty grid.

Alternate Method for Entering Student Requests

Enter several requests for a student at one time. This method allows for 1-to-1 direct substitution of student requests, but must be done for each student but is quite labor intensive.

If entering requests for next year, go to **SV**, **TT: Schedule**, **ST: Courses** and switch the filter to the Build year. Or go to **BV**, **TT: Student**, **ST: Requests.**

HINT: Change the filter

- Step 1: Click the *Student* tab and select the student.
- Step 2: Click the *Requests* side-tab. The requests page for that student appears.
- Step 3: Type the sequence numbers in the *Course number* field for the courses the student is requesting, separated by commas. (See example below.)

School Course > Number	A61, B61, C61, D61, Z61,T01, T03, M41, M51	Add

If you have created a Package, you can type in its sequence and the system will add all the sequences in the package when you click the *Add* button.

- Step 4: Press the *Add* button. The system adds the course requests for the student.

Entering Alternative Requests

X2 allows the entry of alternate course requests. These alternates are a one-to-one substitution for the original request.

- Step 1: Enter all of the student's requests.

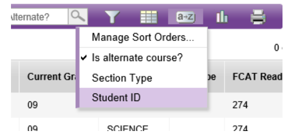
	SchoolCourse > CrsNo	SchoolCourse > Description	Alt 1 > CrsNo	Alt 2 > CrsNo	SchoolCourse > Credit	SecType	SectNo	LASID	TPYView	Periods per cycle	Include in scheduling?
	A13	M/J Language Arts 2, Advanced			1.0			1262328	1/1	1.0000	Y
	Advance-7	Package AVID			0.0			1262328	0/0	1.0000	N
	B12	M/J Mathematics 3 , (Pre-Algebra)			1.0			1262328	1/1	1.0000	Y
	C12	M/J Comprehensive Science 2, Advanced			1.0			1262328	1/1	1.0000	Y
	D12	M/J Civics, Advanced & Career Planning			1.0			1262328	1/1	1.0000	Y
	F01	M/J Spanish, Beginning			0.5			1262328	1/2	1.0000	Y
	H11	Orientation to Nursing			1.0			1262328	1/1	1.0000	Y
	P11	M/J Comprehensive Physical Education 3			0.5			1262328	1/2	1.0000	Y

NOTE: You can enter two semester classes as alternates for an annual class. Just enter the first semester course into the first alternate field and the second semester class into the second alternate field.

- Step 2: Pull down the *Options* menu to *Modify list*. The pencils appear above the columns that may be modified. (See image on the opposite page.)
- Step 3: Click the pencil above the *Alt 1 > CrsNo* column. The column fills with fill able boxes.
- Step 4: Click in the box opposite the course for which you want to enter an alternative course.

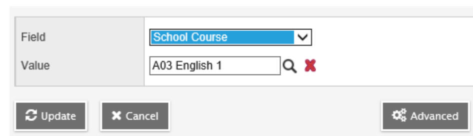
Mass Moving Requests

Use this process to mass move students from one course request to another (Gov/Economics to Economics/Government or to split the wheel requests).



- Step 1: Go to **<u>BV, TT: Courses</u>**.
- Step 2: Select the course from which students are to be removed.
- Step 3: Click **<u>ST: Requests.</u>**
- Step 4: Use the Sort Order button to sort student by "Student ID" to avoid a straight-alphabetical selection.
- Step 5: Select the students to be removed.
- Step 6: Pull the *Options* to *Show Selected*.
- Step 7: Verify that you have selected the correct number of students.
- Step 8: Pull the *Options* menu to *Mass Update* using these fields:
  Field: *School Course*
  Value: *Sequence number* of the course to be added to the students' requests.
- Step 9: Click *OK.*

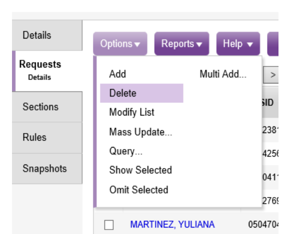
ALERT: ***Read warning messages. "Undo" is not an option.***



To Remove Student Requests as a Group from a Specific Sequence:

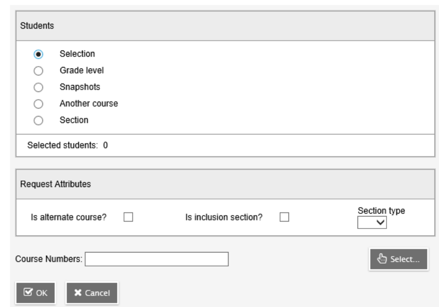
Removing Requests from a Group

- Step 1: Go to **<u>BV, TT: Courses</u>**.
- Step 2: Select the course from which students are to be removed.
- Step 3: Click **<u>ST: Requests</u>**. The list of all students requesting that sequence will appear.
- Step 4: Select the students to be removed.
- Step 5: Pull the *Options* menu to *Show Selected*.
- Step 6: Pull the *Options* menu to *Delete*.
- **NOTE:** READ ALL MESSAGES. There is **no** "undo."
- Step 7: Click *OK.*



Multi-Adding Student Requests

- Step 1: go to **BV**, **TT: Global**, **ST: Request** and pull the *Options* menu to *Multi-Add*. The Multi-Add Requests window allows you to add one or more course requests to students as follows:
  1. Selection – to a hand-picked list of students
  2. Grade level— to all students in a specific grade level
  3. Snapshots – to students in a previously created static snapshot
  4. Another course – to all students that have a request for another specified course
  5. Section – to all students in a particular class/section (available only after the master schedule is built)



- Step 2: When the Multi-Add pick list appears, select the option you wish to use.
- Step 3: Click the *Select* button.
- Step 4: Select the student group you wish to use from the pick list.
- Step 5: Click *OK*. Note the number of selected students to whom you will be adding the request(s).
- Step 6: In the Course Numbers box, fill in the sequence number of the course request you wish to add to the students
- Step 7: Click *OK*. To print a copy of student requests, pull down the *Reports* menu to *Student Requests*.

This is a nice way to obtain a list of students who have requested a particular course.

Filtering Student Requests

Step 1: Go to **BV**, **TT: Global**, **ST: Request** and pull the *Options* menu to *Filter Requests*

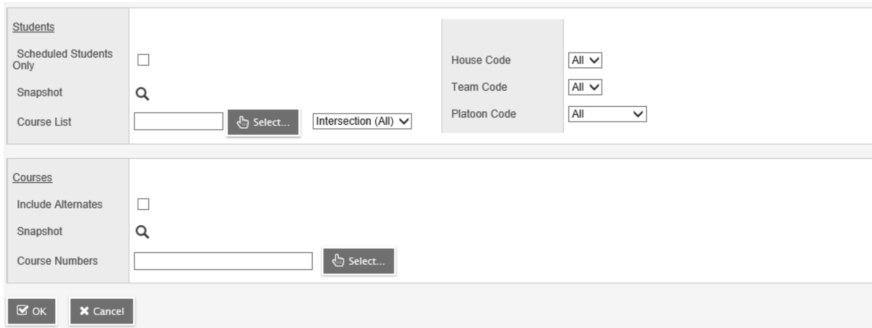
Step 2: Select *Scheduled students only*.

Step 3: Enter the sequence course number for which you wish to see a wait list.

Step 4: In the course portion of the window, enter the previously entered course number.

Filtering
(Continued)

STEP 5: Click *OK*.



IMPORTANT: Run the following reports after you have completed the entry of *all* student course requests.

Reports

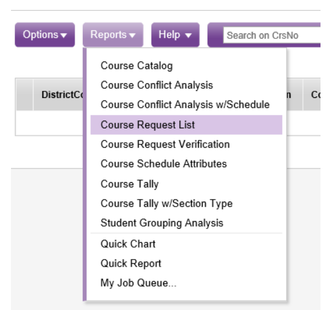
Running the *Course Request Verification* Report

After you enter student course requests, run the *Course Request Verification* report to verify that students have requested the appropriate number of courses. This report is helpful for schools that have different flavors of the same course number by selecting the sub-code feature.

BV, TT: Global, ST: Requests: Reports > Course Request Verification (too many/too few)
You specify the print format.

To calculate section counts for courses (Set Sections**):**

- Step 1: Go to **BV**, **TT: Courses.** The list of courses appears.
- Step 2: Pull down the *Options* menu to *Calculate Section Counts*.



Running the *Course Request List* Report (Wait List)

BV, TT: Courses: Reports > Course Request List: Report a list of students who request each course organized by sequence number; containing name, ID, year of graduation, and gender.

Calculating Section Counts

NOTE:

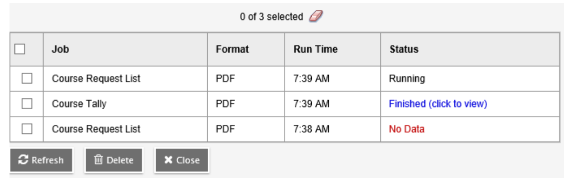
The system calculated number shows in the *Sections Scheduled* field on the Courses tab. Manual adjustments of section numbers are erased by performing a system's calculation.

Running the Course Tally Report

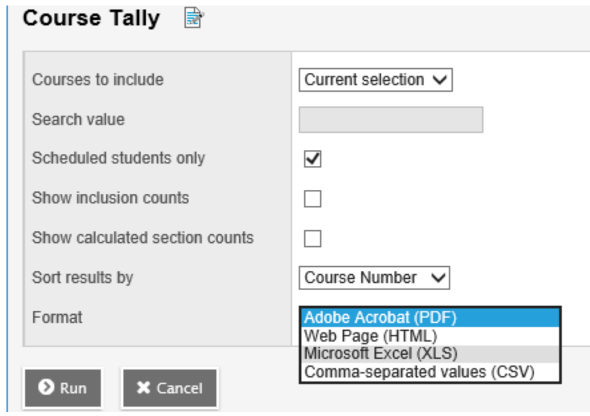
BV, TT: Courses: Reports > Course Tally: Report shows the number of student requests entered for each course; contains: sequence number, description, department, level, number of primary requests, alternate requests, inclusion, total requests, enrollment max, and section count (if selected on the report formatting window).

My Job Queue

X2 Aspen keeps track of all the reports you have requested per log-on. There is no need to recreate the report parameters if you wish to see the report again. Action: *Reports* menu down to *My Job Queue* to see all the reports in memory. To see the report again, simply click on its link in the *Status* column of the dialog.



Depending on current use, the reports may take a few minutes to generate and display on your monitor. Also, all reports can be exported in Excel format.



Students

All student demographics are updated nightly from DSIS. However, student scheduling attributes must be updated in X2 Aspen.

BV, **TT: Students**, **ST: Details**

Scheduling Parameters

The required field in this section is *Include in scheduling?* All students that you plan to schedule must have a "Y "in this field. You may mass update this field.

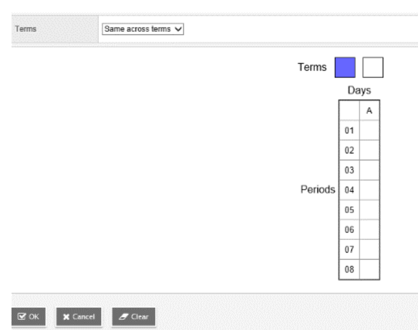
Note: Can't find students? Change the filter to "All Students" and search again.

- Step 1: Go to **SV**, **TT: Student** and select the student for whom you wish to define scheduling parameters.
- Step 2: Click on **ST: Details** and verify the information that came in from DSIS.
- Step 3: Go to **ST: Schedule, SbT: Attributes**. The *Attributes* dialog opens.
- Step 4: Check the box for *Include in Scheduling*.
- Step 5: Change the *Schedule Priority* only if you wish to give certain students priority in scheduling, e.g. upperclassmen over lowerclassmen, special needs students, etc. Otherwise leave this field at zero (0) as zero is the highest priority.
- Step 6: Choose a team *only* if you wish to schedule a student on a certain team by hand. Otherwise the scheduler will randomly assign the student to a team.

Unavailable Schedule for Part-Time or Shared Students

NOTE: If a student only attends classes at your school for part of the day, you can ensure that the scheduler will place the student during the correct periods by marking the student unavailable in the periods they do not attend your school.

- Step 7: Click on *Edit Schedule* opposite the *Unavailable schedule* label. The schedule dialog appears. (See right).
- Step 8: Click the term boxes that apply and the periods of your schedule when the student is unavailable. E.g. the student is at a shared school such as Baker Aviation.
- Step 9: Click *OK.*
- Step 10: Click *Save* in the dialog to save your entries.



There are several optional fields:

- Student Scheduling Priority
- Lock Schedule
- Static Team
- Unavailable Student

Student Scheduling Priorities

HIGHLY RECOMMENDED

Student Load Priorities allow you to specify which students should be given priority when the scheduling engine fills classes. Suggested Student Scheduling Priorities are as follows, but can be modified to suit individual school needs. Student Load Priorities can be updated individually through **BV**, **TT: Student**, **ST Details**, but it will be easier to select all students in a particular group and mass update them.

Student Group	Scheduling Priority
AP Students	5
Seniors	10
Honors	15
Juniors	20
Sophomores	30
Freshman	40

Lock Schedule

This feature may be used after students have been scheduled to prevent some students from being rescheduled if you decide to re-do your scheduling run. It is recommended that you unlock all schedules prior to committing your schedule for final transfer.

Static Team

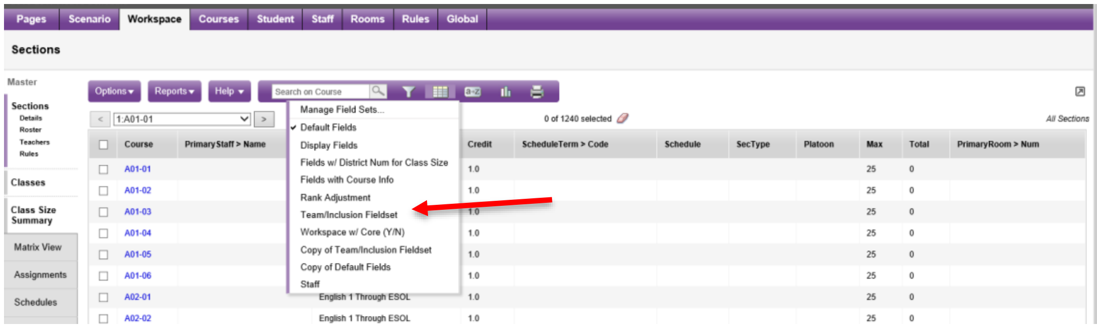
By opting to include teaming in your schedule, X2 Aspen will dynamically assign students to teams. However, if a student *must* be on a specific team, you may select the desired team from the drop-down list. As you do this, the system will automatically place a check-mark on the Static Team Box.

Assigning Team Codes to Sections

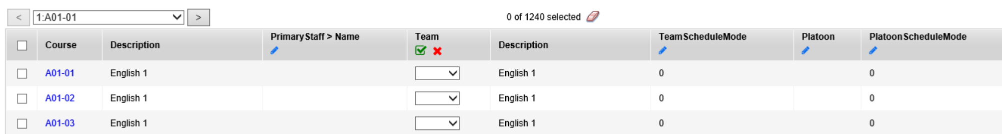
Coding Sections for Teams

Entering team codes: Required if all teams share the same course sequence numbers. Skip this if control your team is controlled by sequence number or if you do not have any teams.

- Step 1: Change the Field Set to *Team/Inclusion Field Set*.
- Step 2: Make sure your filter is showing *All Sections*.



- Step 3: Go to the *Options* menu to *Modify List.* The pencils appear.



HIGHLY RECOMMENDED

Plan you teams (teachers & sections) on paper before assigning sections to teams.

- Step 4: Click on the pencil above the *Team* column. The drop-down fields appear
- Step 5: Use the drop-down lists to code the proper sections with the proper team code.
- Step 6: Click on the green checkmark to save your entries.
- Step 7: Click on the pencil at the top of the *TeamScheduleMode* column.

- Step 8: Use the drop-down fields to select the Team Schedule Mode. See table for illustrations of each mode.

Exclusive	**Strictly Red team members only**
Open	**Red or no team membership at all**
Mixed	**Red team or Blue team**
Unrestricted	**Red preferred, but anyone else can get in**

Coding Sections for Inclusion

Entering inclusion section types

Leave blank unless you set a percentage on the scenario preferences. This will group the students that have the same sequence number.

- Step 9: Click on the pencil over the *Inclusion?* column. The checkbox fields appear. (See below.)

- Step 10: Check the boxes of the sections that are to have inclusion.
- Step 11: Click on the green checkmark to save your entries.

Scheduling Rules

Use scheduling rules to alert the system to any constraints it must follow when building your master schedule. In general, to define a scheduling rule:

Defining a Rule

- Step 1: Go to **<u>BV</u>**, **<u>TT: Rules</u>**. The list of rule definitions appears.
- Step 2: Click the name of rule of the rule type you wish to define The Rule Definitions page for that rule appears.
- Step 3: Pull the *Options* menu down to *Add*. The New Schedule Rule page appears.
- Step 4: Fill out the parameters for the rule you wish to create.
- Step 5: Click *Save*.

Advice: Careful planning of your rules will save you time during the validation phase.

Deleting a Rule

Step 1: Go to **<u>BV</u>**, **<u>TT: Rules</u>**.

Step 2: Choose a type of rule from the list and click its link. The list of rules appears.

Step 3: Select with a checkmark the rule or rule(s) you wish to delete.

Step 4: Pull the *Options* menu down to *Delete.*

Step 5: Read the confirmation message

Step 6: Click the *OK* button.

NOTE: Although you can create an unlimited number of each scheduling rule, be aware that these rules constrict the options X2 Aspen has to place students in the courses they request.

HIGHLY RECOMMENDED

Use the **Schedule Rule Worksheet** found in the Appendix to plan your rules **<u>before</u>** entering them into X2 Aspen

Rule Examples

Rules for Teachers

Rule*	Explanation
Teacher Common Planning	Tells the system which teachers need a common planning period together.
Teacher Unavailable	Tells the system which periods teachers cannot be scheduled. E.g. Head Coach, Athletic Director, Department Head, Testing Chairman, etc.
Teacher Reserve Time Block	Use this to ensure that teachers receive a planning period on both odd and even period days of their block schedule.

Rules for Courses

Rule*	Explanation
Course Alternate	To specify an alternate for a course. E.g. When the Art 2-D classes are filled, students are automatically redirected to Drawing and Painting.
Course Blocking: Consecutive	To schedule periods in back-to-back periods. E.g. CRRP Language Arts and Reading classes.
Course Blocking: Simultaneous	To create combination classes.
Course Blocking: Terms	To block courses across terms in the same periods with different teachers and different number of sections. Can specify same teacher. Can specify platoons (exact same students). E.g. one section of Personal Fitness taught in Term 1 must split into two sections of Health for Term 2.
Course Bind Next	To block courses across terms when the courses have the same number of sections, the same teachers, and the same periods. The order in which you place the courses when you create this rule determines which course will be taught in Term 1 and which in Term 2.

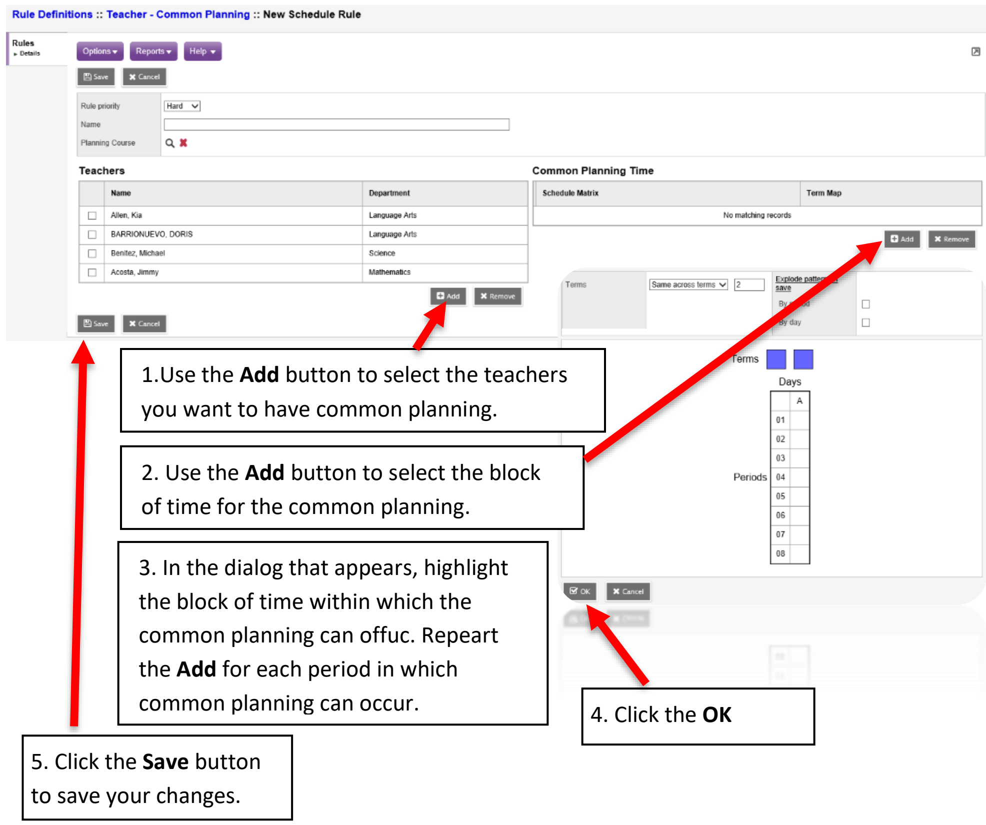
Rules for Rooms

Rule*	Explanation
Room Reservations	To ensure that specific courses are scheduled into single-purpose rooms. E.g. weight rooms, shop rooms, dance studios, etc. cannot be used as general purpose classrooms.
Room Unavailable	To make a room unavailable for a specific period.
Room-Teacher Restriction	To specify multiple rooms for one teacher.

HIGHLY RESTRICTIVE

This rule reduces the flexibility for scheduling students during a specific period.

Rule: Teacher Common Planning



Schedule Rule Summary Report

To print a list of the scheduling rules you create, run the Schedule Rule Summary report.

Step 1: Go to **BV, TT: Rules**.

Step 2: Pull the *Reports* menu down to *Schedule Rule Summary*.

Step 3: Use the magnifying glass to pick the rule for which you want a summary.

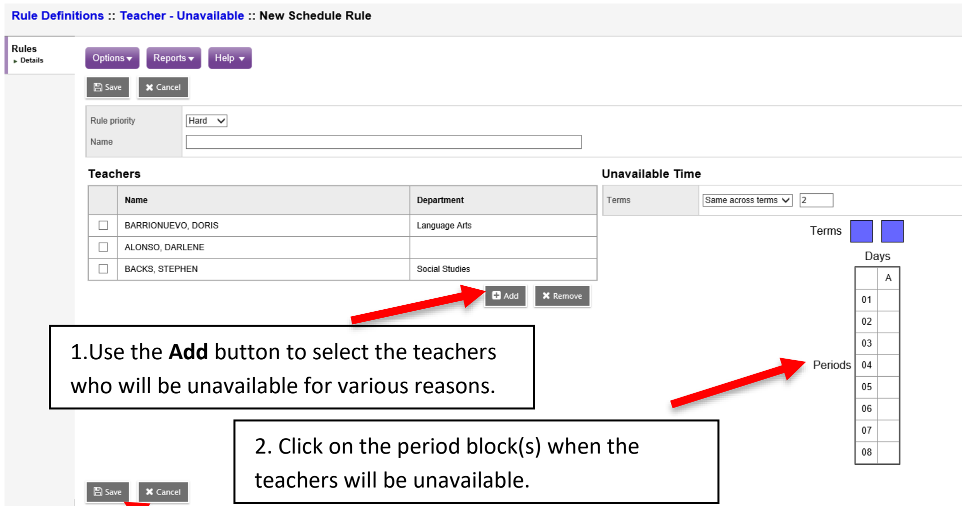
Step 4: Pick a format for the report.

Step 5: Click *Run*

Teacher Unavailable

HINT: *Use for department chairs, business managers, UTD steward, reading coaches, test chairs, SCSI, special assignment, etc.*

Rule: Teacher Unavailable



1.Use the **Add** button to select the teachers who will be unavailable for various reasons.

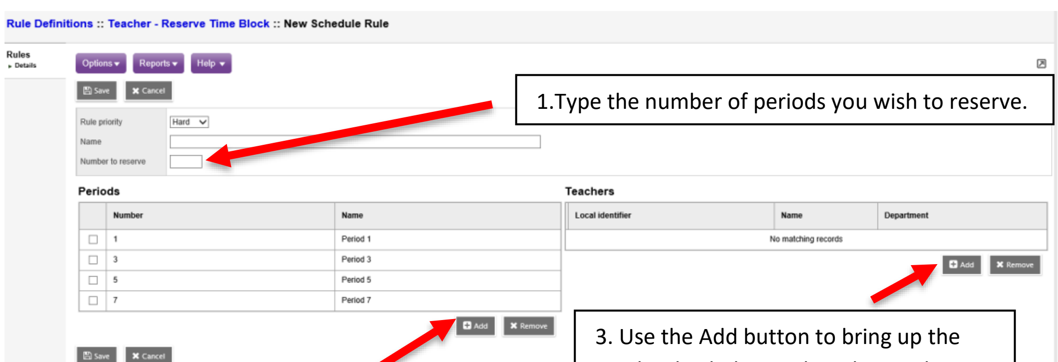
2. Click on the period block(s) when the teachers will be unavailable.

3. Click on the **Save** button.

Teacher – Reserve Time Block

HINT: *Use to guarantee a planning period on both days of an odd-even school schedule.*

NOTE: *You may need two rules: one for the odd day and another for the even day.*



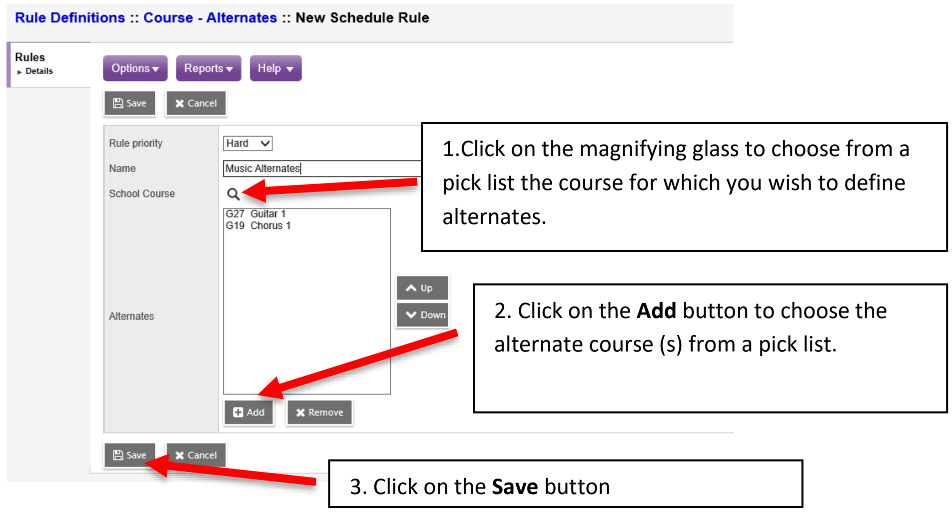
1.Type the number of periods you wish to reserve.

2. Use the **Add** button to bring up the period list. Select the periods that will be reserved.

3. Use the Add button to bring up the teacher list below. Select the teachers for whom this rule will apply.

Course Alternates

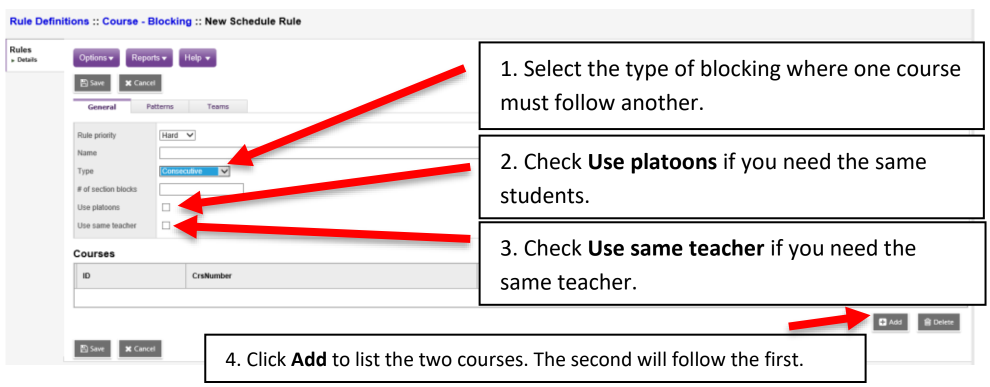
NOTE: *This is a global rule affecting everyone who requests the primary course.*



WARNING: To allow this load rule to work, you must go to the course you chose in step one at **TT: Courses**, **ST: Details** and place a check in the box next to "Are subs allowed?"

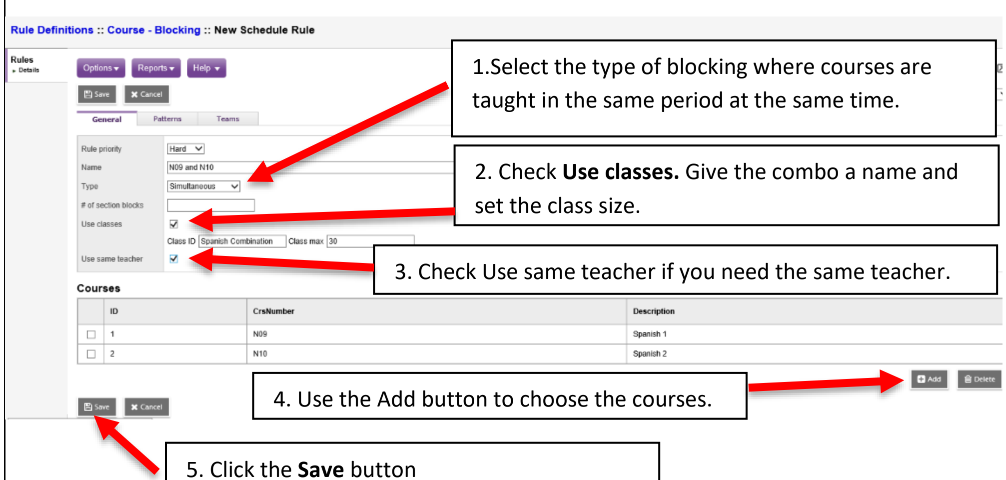
Course Blocking Consecutive

NOTE: *Use the Teams tab to specify a pair (or pairs) of teachers who are teaching these consecutive courses.*



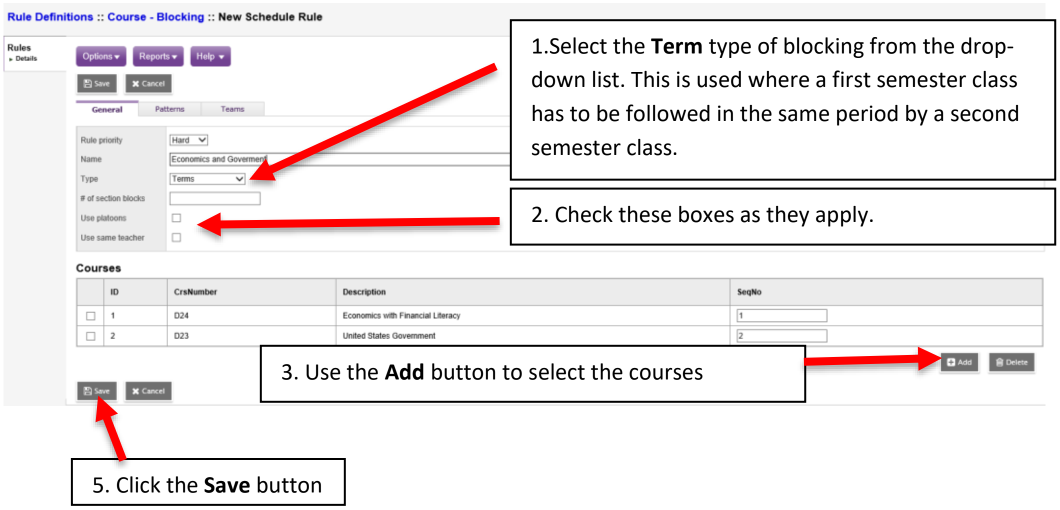
Course Blocking Simultaneous

WARNING!
Unlike other schedulers, this rule does not bind the courses together. They must be rescheduled separately.



Course Blocking Term

NOTE: *Use the Teams tab to specify a pair (or pairs) of teachers who are teaching these Term 1/Term 2 courses.*



Use the Course Bind Next feature to link a semester course with another course in the second semester if the second course shares the same conditions for:

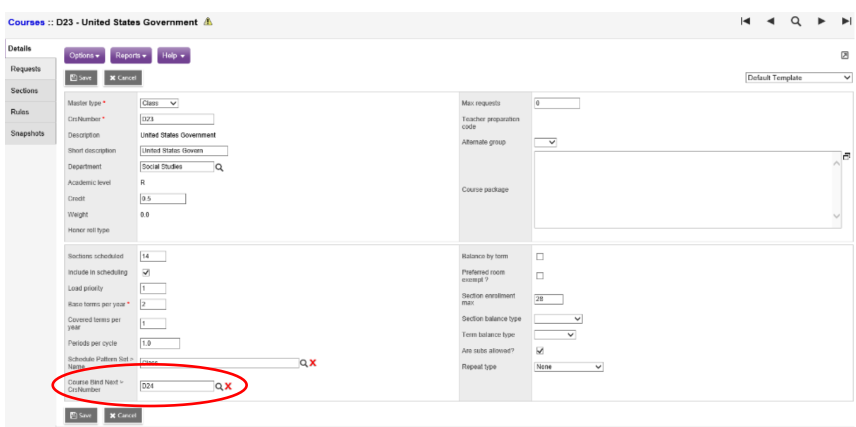
1 - same group of students,
2 - same teacher,
3 - remains in the same period,
4 - and if both courses contain the same amount of sections.

This feature makes the two semester courses appear as an annual course. **If all 4 conditions cannot be satisfied, a <u>course term BLOCKING rule must be created</u>.**

- Step 1: Go to **<u>BV</u>**, **<u>TT: Courses</u>**.
- Step 2: Click on the appropriate course.

Course Bind Next

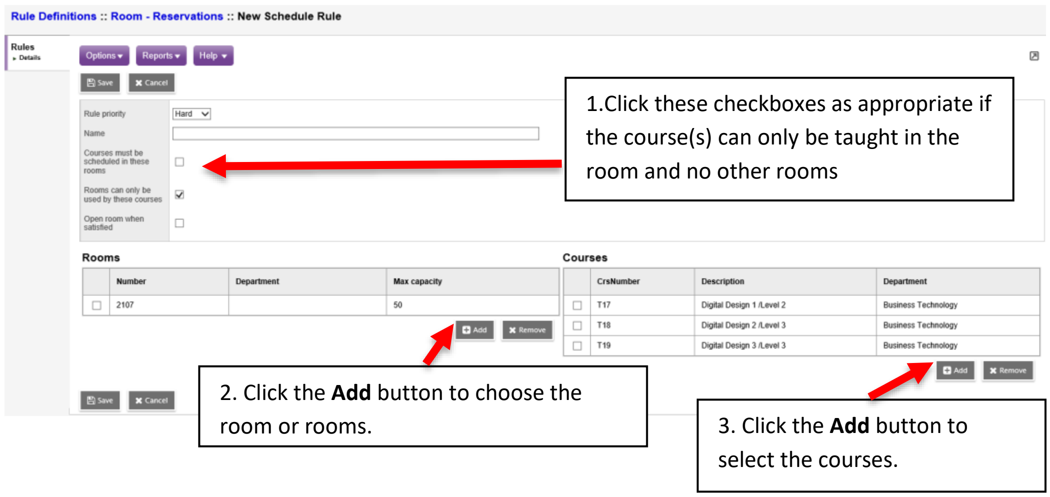
NOTE: This field must remain blank for all T2 courses to avoid validation errors.



- Step 3: At the bottom of the Details window, use the Magnifying glass to find the second semester course sequence that will follow.
- Step 4: Click on the *Save* button.

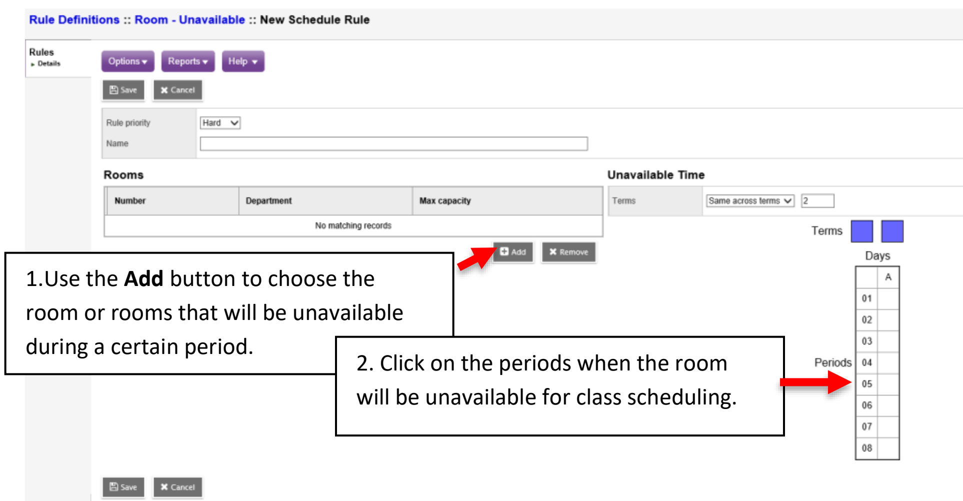
Room Reservations

NOTE: This rule is seldom used since each teacher is assigned a room number.



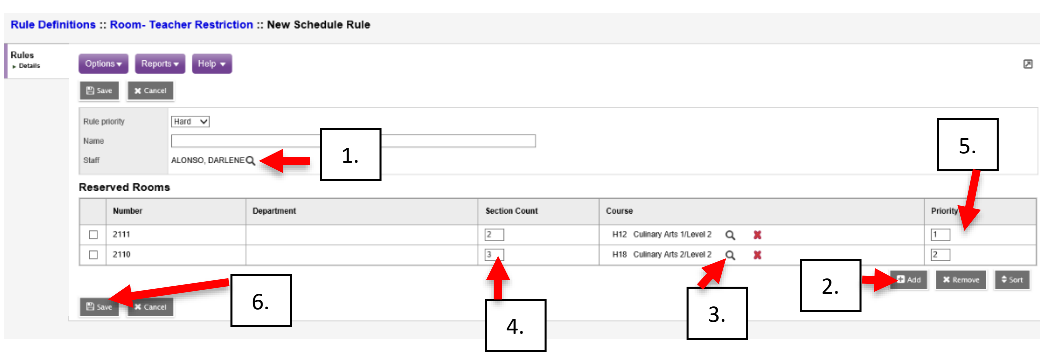
Room Unavailable

NOTE: *Always click Save after creating a rule.*



Room–Teacher Restriction

This rule allows you to specify multiple rooms for one teacher.



- Step 1: Use the magnifying glass to pick the teacher.
- Step 2: Use the *Add* button to select the rooms.
- Step 3: Use the magnifying glass to pick the courses affected.
- Step 4: Enter how many sections of each course will be affected.
- Step 5: Enter which room has what priority.
- Step 6: Click the *Save* button to save the rule.

Calc. Section Count

Once you have entered your student subject selections into the scheduling engine, you are ready to generate the amount of sections each of the active courses must be initialized. This system generated number is based on the total number of request divided by the total number of available seats.

NOTE: Repeating the section count after manual section count adjustments will override the manual counts.

Follow these steps to instruct Aspen to generate a section count:

Step 1: Go to **BV**, **TT: Courses.** The list of courses appears.

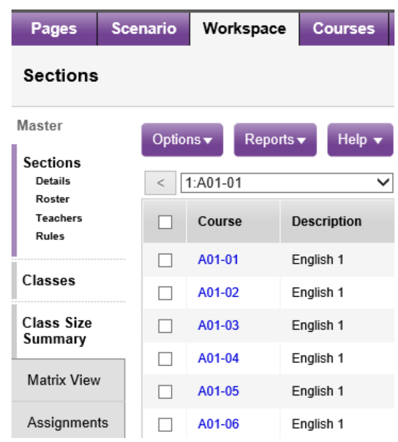
Step 2: Pull down the *Options* menu to *Calculate Section Counts*.

NOTE: The number that the system calculates appears in the *Sections Scheduled* field on the Courses tab.

Initializing the Work-space

After you determine the number of sections you need to offer for each course, you must initialize the workspace to include a separate record for each section of each course.

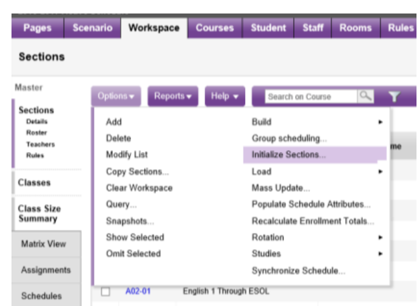
WARNING: Initialize the workspace only once. The process does not delete sections, but adds new sections, or warns you that you have too many sections for a course. Manually add or delete to reduce the chance of error.



Step 1: Go to **BV**, **TT: Workspace**.

Step 2: Pull the *Options* menu down to *Initialize Sections…*

The system creates a row on the workspace for every section of each course that you identified when you entered your course scheduling attributes. *After* you initialize the workspace, you can assign information such as teachers, terms, rooms, and even specific schedules to course sections.



Step 3: In the dialog that appears, select the courses for which you wish to initialize sections. You can select *All* or a selection, or the courses of a department, or a grade level, or a snapshot of courses you have created.

Step 4: Click *OK.*

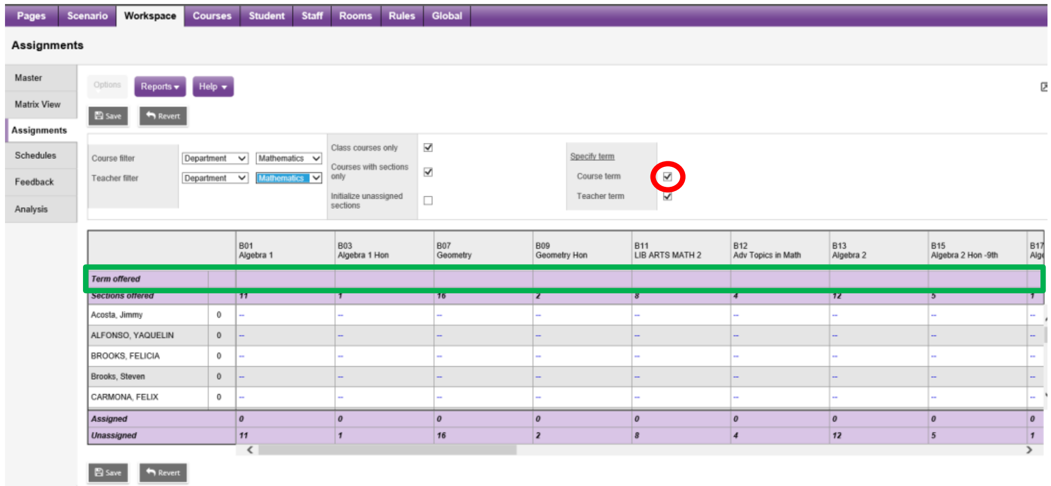
After initializing the sections, the Workspace tab is now populated by the number of sections (total amount of courses X number of calculated sections).

Assign. Teacher & Term

NOTE: Assign terms only to the sections corresponding to semesterized courses only.

Teachers and the terms must be assigned to each section. The two most commonly used options are:

OPTION 1: Using the side tab on the Workspace screen: **ASSIGNMENTS**



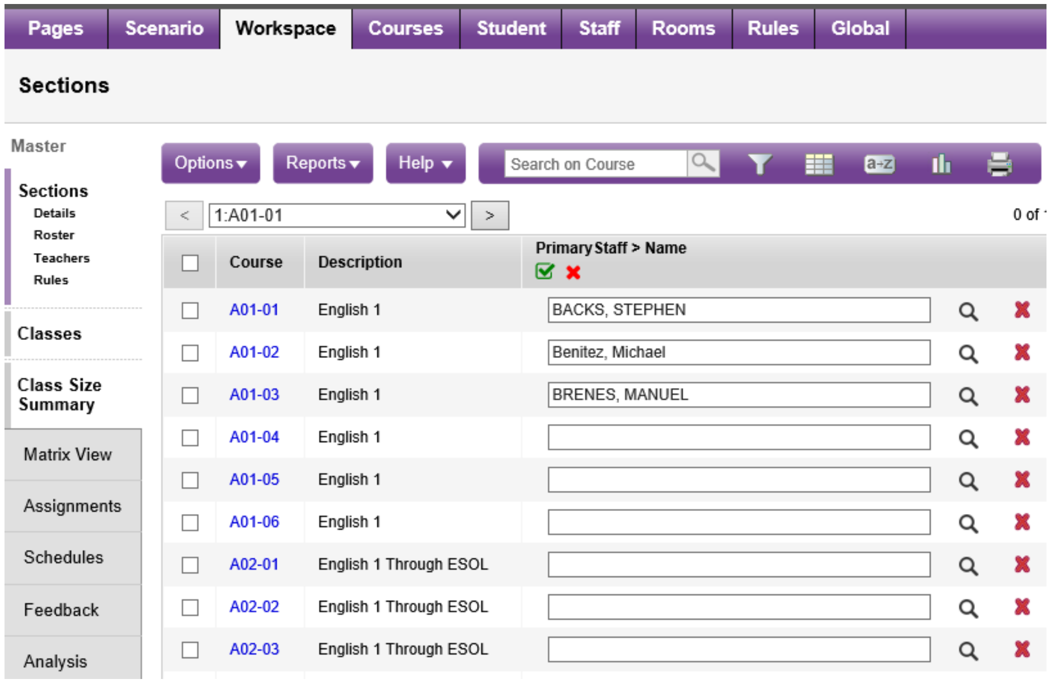
Step 1: On the Course Filter, select the department that includes the courses that will be assigned to the necessary sections.

Step 2: On the Teacher Filter, select the teacher's department to generate the list of teachers that will receive the sections that will become their teaching schedules.

Step 3: If the courses are semesterized, click on the box next to Course Term under the "Specify Term" (circled above in red) to enter a "1" for the first semester, or a "2" for the second semester on the Term Offered line (see green box above).

DO NOT FORGET TO SAVE PRIOR TO EXITING THIS WINDOW!

OPTION 2: On the Workspace tab, activate the **Modify List** command found in the Options menu.



After activation of the Modify List option, select the pencil on the column header you wish to work on. For the teacher assignment column, type or click on the magnifying glass to select a teacher from the general teacher roster. Upon completion of the records in view, click on the green boxed check mark to save your selection.

NOTE: Keep the number of displayed records at no greater than 25 to avoid data conflicts.

Repeat the same functions for allocating the correct semester designation for all semesterized courses.

DO NOT FORGET TO SAVE PRIOR TO EXITING THIS WINDOW!

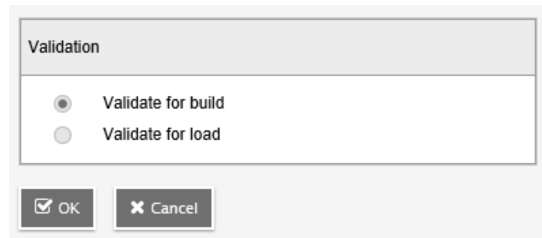
WARNING! Do not begin to build your master schedule, until all the student requests, all scheduling parameters for your courses, students, staff and rooms, and all the rules the system needs to follow to build your school's schedule are complete.

Validating Your Data

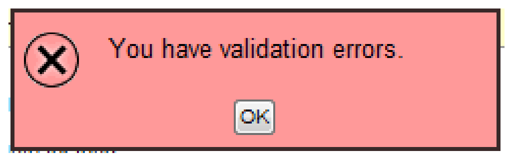
X2 Aspen allows you to check or validate all the information you entered up to this point. If the system finds any errors that would prevent it from creating a master schedule, it will give you a message stating that you have validation errors. Anticipate this message many times as you validate your data. Most schools have validation errors. Simply fix the errors and validate again until you get a validation success message.

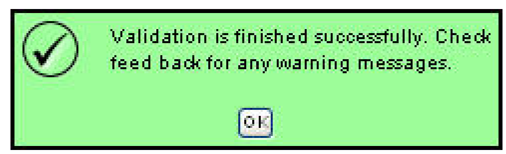
NOTE: You can fix many errors easily using the *Mass Update* option.

- Step 1: Go to **BV**, **TT: Workspace.** The Workspace displays all the sections you prepared.
- Step 2: Pull down the *Options* menu to *Build,* and then slide over to *Validate*. The dialog at right appears.
- Step 3: Select *Validate for build*.



- Step 4: Click *OK*. The system displays a progress meter while it validates your information. If you have errors, the message at right appears.
  Otherwise the green message at the right appears.





- Step 5: Click *OK.*
- Step 6: Click the **ST: Feedback** to view validation errors.
- Step 7: Fix the fatal errors and evaluate the warning errors that you may also want to fix.

ALERT: *Always read your warning messages. "Undo" is not an option!*

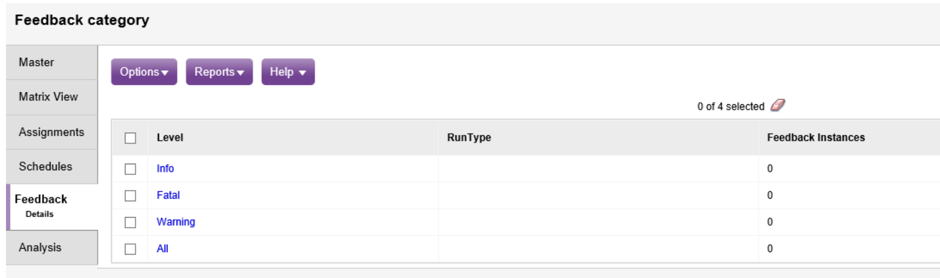
After you validate the information you entered when preparing to build the master schedule, the system alerts you if you have errors. You need to know what the errors are, fix the ones you need to, and then validate until the errors no longer exist.

Correcting Validation Errors

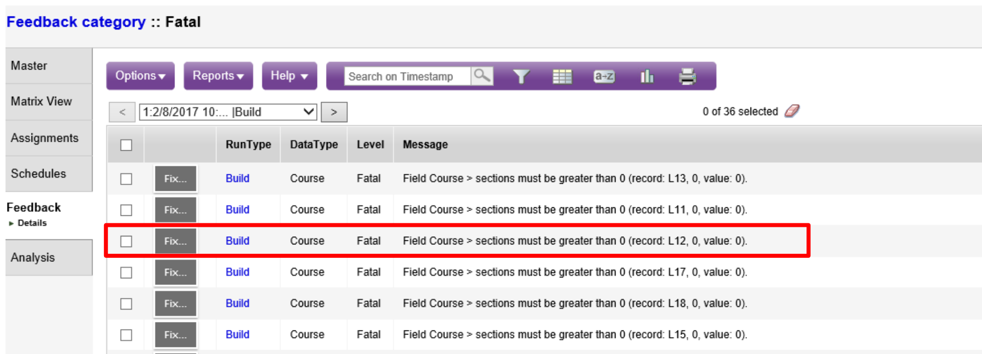
- Step 1: Go to **BV**, **TT: Workspace**, **ST: Feedback**. (See Below.)

  The system has three kinds of errors:

  1. **Fatal**: You must fix these errors (REQUIRED).
  2. **Warning**: You probably want to fix these errors (OPTIONAL).
  3. **Informational**: Gives you the number of errors found and the time the system took to complete the validation.



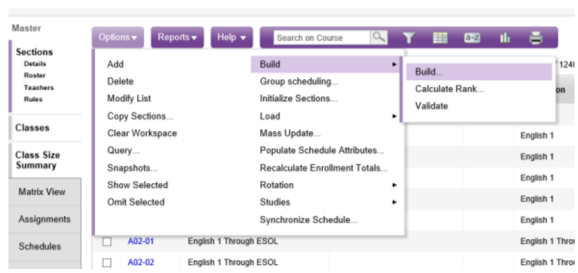
- Step 2: Click on the *Fatal* category to see the fatal errors that would stop the build. The list of fatal errors is shown below.



- Step 3: Click on the *Fix* button and make the correction on the screen that appears. In this case, you would need to fix the *Max-in-A-Row* column to read something more than zero.
- Step 4: Fix all the fatal errors, and then run the Build Validation again. When there are no more fatal errors, you are ready to build the master schedule.

You are finally ready to begin the Build of your master schedule.

Pull down the *Options* menu to *Build,* and slide across to *Build* in the submenu that appears.



Running the Build

When you build the master schedule, the system attempts to fill in the period and room for each of the sections you have prepared on the Workspace tab. While abiding by your parameters and rules, the system might reach a section that it cannot schedule due to conflicts with previously scheduled sections, or scheduling rules you created. When this happens, the system attempts to reschedule previously scheduled sections to make room for the current section.

Running the Schedule Feedback Report

If the system still cannot schedule the section, the scheduler will stop and, tell you which section cannot be scheduled. You can use the **ST:Analysis** on the **TT: Workspace** to figure out what needs to be fixed for that section to schedule. You can also click **SbT: Rules** on the **ST: Details** to view any rules associated with this section. The rules are the restrictions that you placed on a section and might be the reason the system is having trouble scheduling the section. *Do not hand-schedule the section – Use the tools to figure out why the section will not schedule. Fix the trouble spot and begin the build sequence once more.*

DO NOT HAND-SCHEDULE SECTIONS THAT PRESENT WITH ERRORS.

TIP: Each time you build the schedule, you have the option of locking the sections that are already scheduled, or unlocking them to be rescheduled.

When the system builds a schedule you are happy with, you can load students into the schedule to maximize section balances and requests satisfied.

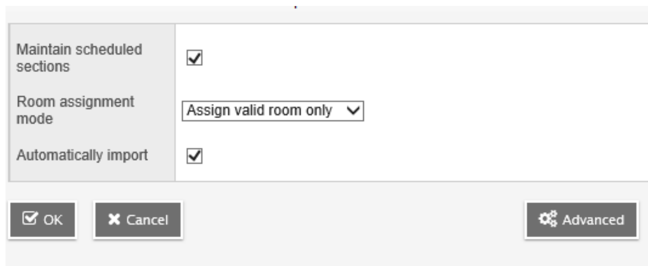
You might want to save the workspace as it is, but continue to build the scenario to attempt to satisfy more requests or rules. To do so, copy the scenario and rebuild the new copy.

Analyzing The Build

- Step 1: Go to **BV**, **TT: Workspace**.
  Step 2: Pull the *Options* menu to *Build*, and then down again to *Build.* The Build Schedule dialog box appears.
- Step 3: Check the *Maintain Scheduled Sections* checkbox if you are happy with how X2 Aspen scheduled them in the previous build and you do not want X2 to reschedule them.

NOTE: Make sure you have validated the information before you build, and that you have fixed all fatal validation errors. If you have not, the build will not run and will alert you to fix the validation errors.

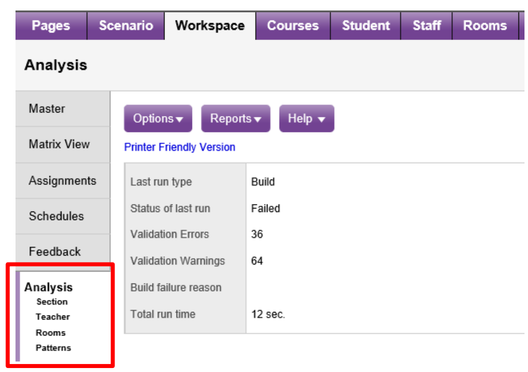
If you uncheck this box, X2 Aspen will reschedule all sections from the beginning again. Check the *Automatically import* checkbox to save you a step later.



- Step 4: Click *OK*.

X2 Aspen displays the progress meter which tells you which section it is currently scheduling. When X2 Aspen has trouble scheduling a section or finishes the build, the build stops.

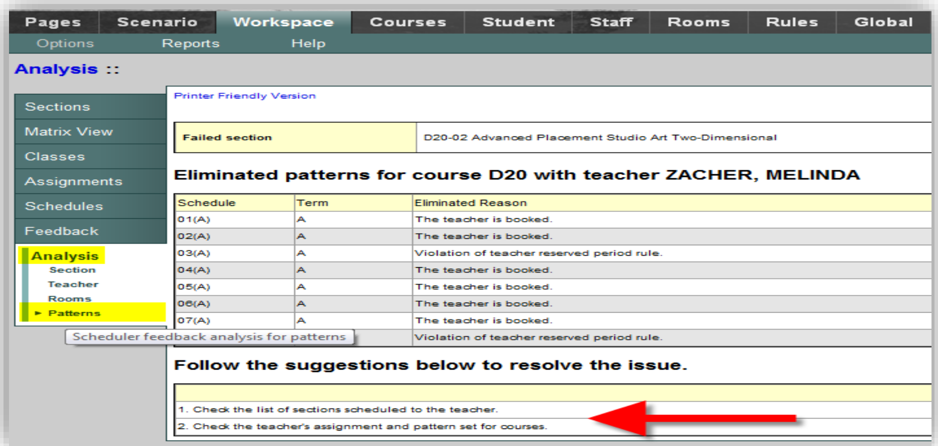
- Step 5: X2 Aspen automatically displays the schedule by sections on the **TT: Workspace** and tells you which section failed, if any.
- Step 6: Do one of the following:
  1. Click the **ST: Analysis** to determine why X2 Aspen cannot schedule the failed section. This tab contains four sub-tabs: **SbT: Sections**, **SbT: Teachers**, **SbT: Rooms**, and **SbT: Patterns**.
     NOTE: Click *Printer Friendly Version* at the top of the **ST: Analysis** to print the analysis information.



  2. Click each sub-tab to determine what you need to update for the system to schedule this section. Make the changes you need and repeat the Build process.

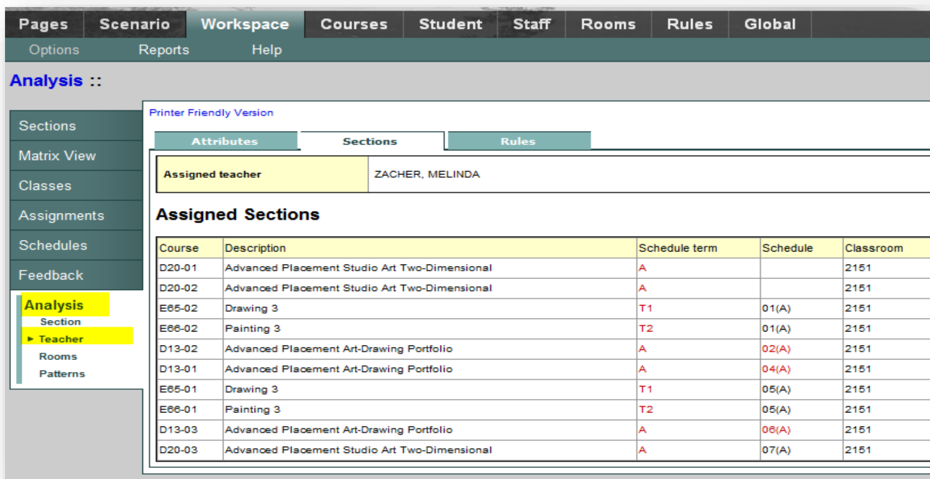
Under the Analysis menu (*see the above screen shot*), use the *Patterns* sub-menu to identify where the potential issue or series of issues that are preventing the scheduling engine from completing the build.

The screen shot below displays how this feature identifies the specific conflicts (top portion of the screen shot) and also provides the user with suggestions as to where the problem may be found and corrected.



Fatal Error Identifier

To extract more information that may assist with resolving the error, the Teacher sub-tab under the Analysis side tab is often helpful since it reveals a number of conflicts like an overscheduled teacher (oversubscribed) and issues related to incorrectly written rules.



Locking Specific Sections

Every time you click *Build* on the *Options* menu, X2 Aspen shuffles the sections to try to achieve the best possible schedule for your school. If, after running a Build, you are happy with where some sections are scheduled and do not want the system to reschedule them the next time you click *Build*, you can lock those sections. The sections remain scheduled where they are as of the last build.

HINT:

You can use the Mass Update to lock several sections at one time.

- Step 1: Go to **BV**, **TT: Workspace**.
- Step 2: Select the section.
- Step 3: Click the **ST: Details**.
- Step 4: Check the *Is section locked* checkbox.
- Step 5: Click the *Save* button to save your entry.

Manually Checking the Build

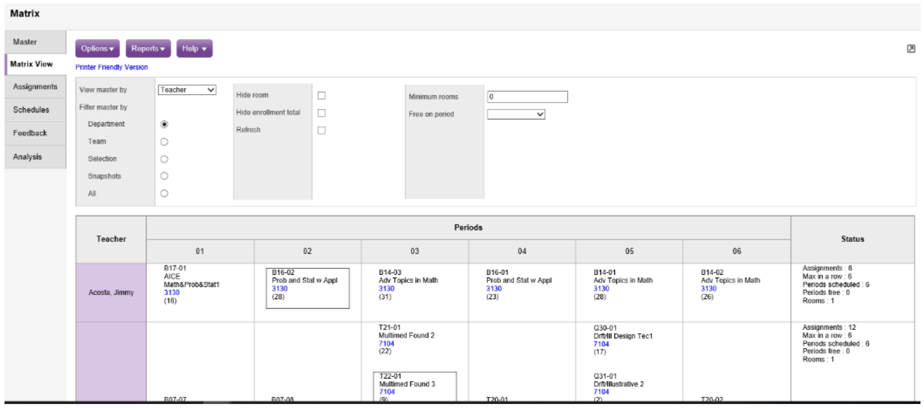
Manually Check the Built Master Schedule for Structural Problems

To check the built master schedule manually, print the Master Workspace.

- Step 1: Go to **BV**, **TT: Workspace**.
- Step 2: Pull the *Reports* menu down to *Workspace Master Schedule.* The dialog box appears.
- Step 3: Enter the report parameters you desire.
- Step 4: Click the *Run* button.

Master Schedule Review

Before you load the students, review the master schedule you have so far.



Note: This procedure will take a few minutes to display.

Step 1: Go to **TT: Workspace**, **ST: Matrix View**. (See above.)

Step 2: Views can be adjusted to see the master schedule by Course, Teacher, Room, or Department.

Drag & Drop Changes

X2 now allows for a selected course to be changed by selecting the section and dragging it to the desired slot. This is not recommended when students already populate the Master Schedule.

Running Reports to Analyze the Built Master Schedule

X2 Aspen has five reports you can run to help you analyze the schedule you have built.

With the **TT: Workspace** selected, the following reports appear under the *Reports* menu.

- **Requests Not Scheduled Report:**
  Display the courses each student requested, but did not get into when you built the master schedule. View these unsatisfied requests by student name or by course, and use the results to determine if you need to change any section and rebuild those to satisfy more requests.
- **Course Schedule Summary Report:**
  Summary of Courses, their Descriptions, the Sections, Total Requests, Total Seats, Average Seats, Open Seats, Requests Scheduled Percent Scheduled, and Conflicts.
- **Teacher Utilization Report:**
  Compiles a list of teachers and all the courses they are scheduled to teach each period. The system sorts teachers by department. Use the results to determine if a teacher is over- or under-utilized.
- **Room Utilization Report**
  Run this report to view a list of room and all the courses that are

scheduled to meet there each period. You can sort the report by course number, building, or department. Use the results to determine if a room is *over- or under-utilized*.

- **Student Schedule Summary Report**
  Run this report to view each student's number of requests (primary and alternate), number of requests satisfied, number of alternate requests used, and percent scheduled. Use this report to determine where the holes are in a student's schedule.
- **Unscheduled Teachers Report**
  Run this report to view the periods that a teacher is not teaching. The report displays in landscape orientation and lists the teachers by period. Use this report to tell which periods the teachers are free.

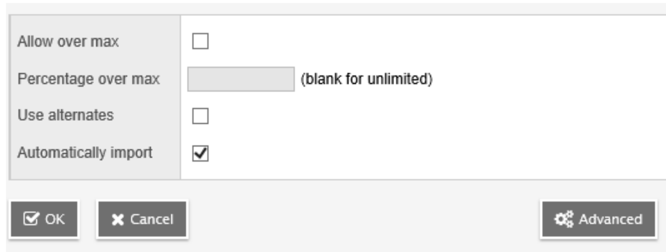
Loading Students

Loading Students into the Master Schedule

After you build your master schedule on the Workspace tab, load students into the finished master schedule. Loading students into the schedule maximizes section balances and requests satisfied.

NOTE: *the system alerts you if you have to fix validation errors*

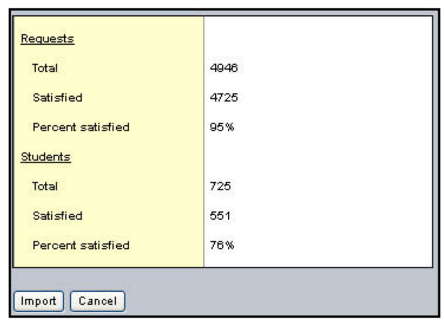
- Step 1: Go to **BV**, **TT: Workspace**.
- Step 2: Pull the *Options* menu to *Load* and then down to *Load* again. The Load Students dialog box appears.



- Step 3: Check the *Allow over max* checkbox if you want the system to ignore the maximum enrollment numbers you defined for sections.
- Step 4: Enter the percentage over the maximum you want to allow the system to schedule students. If you leave this field blank, the system uses no limit.
- Step 5: Check the *Use alternates* checkbox if you want the system to attempt to schedule students into their alternate requests if primary requests are not available.
- Step 6: Click *OK.*
  The progress meter displays the name of the student whom it is currently scheduling and the number of students remaining to be scheduled.

NOTE: X2 suggests you select this checkbox the first time you load students. This action helps you see the real problems with the schedule, such as if students cannot be scheduled into a course section for a structural reason rather than because sections are closed.

When the system finishes scheduling students, the following Load Students results appear.



Under the Students section, the *Percent satisfied* means the percentage of students fully scheduled. However, since you loaded allowing the computers to go over the maximum class size, you need to discover where you students are over filling the classes to judge where you might have to open another section or move a section.

Once you load the students, use the *Course Schedule Summary* to be sure that you have enough seats for everyone. You can also determine if there are any courses that are showing a lot of conflicts (last column).

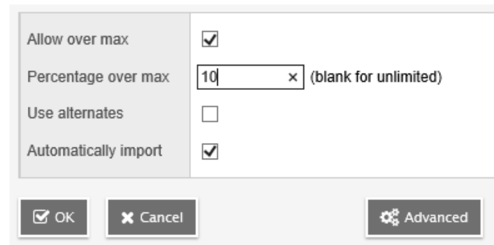
NOTE: You should have at least <u>85 percent of your students fully scheduled</u> to declare that you have a workable schedule. A *percent fully satisfied* below this benchmark would indicate that you may have major issues with your Build.

Course Schedule Summary

2 June

Course	Description	Sections	Total Requests	Total Seats	Average Seats	Open Seats	Requests Scheduled	Percent Scheduled	Conflicts
B71	M/J Mathematics 2	6	116	150	18	34	111	96	5
B72	M/J Mathematics 2, Advanced	2	45	50	22	5	45	100	0
B75	M/J Mathematics 2	2	10	50	4	40	9	90	1

If you like the results, then you need to re-load the students, this time with a cap on the section size.



Upon student "re-load," the scheduler will create a new course combination for all students with "unlocked" schedules by going to **<u>TT:Workspace</u>**. Pull the *Options* to *Load*, and then choose *Load* on the submenu.

On this second load, you MUST enter a percentage over max. The ideal target is 10-15%. This will give you a truer picture of your schedule, but a higher number of students whom have incomplete or empty schedules.

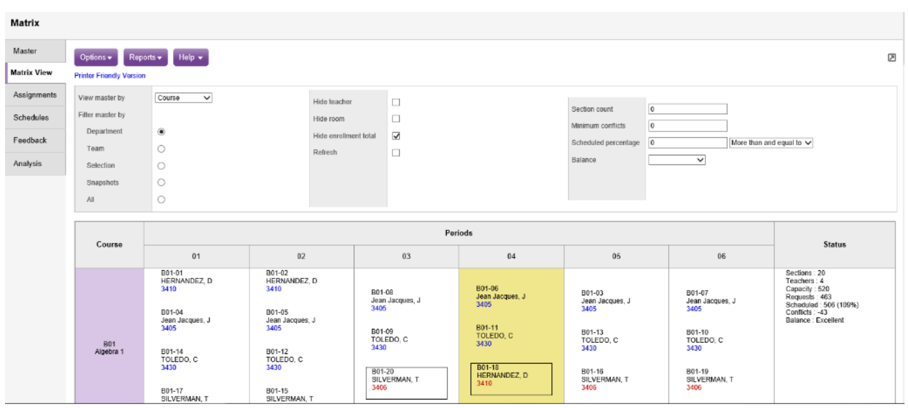
NOTE: This view may take several minutes to load since it will show you the entire master schedule.

X2 Aspen has many reports that analyze what has happened in the build and loading processes. Some of these have been moved into the application so that they are now available on screen.

To access this screen, go to **<u>TT: Workspace</u>**, **<u>ST: Matrix View</u>**.

You can use this Matrix View to check student load and load balance, percent scheduled per class, and highly conflicted classes. From here, you can make adjustments to the schedule. (See below.)

Matrix View Reschedule



Rescheduling a course from the Matrix View

- Step 1: Click on the blue link of the course/section numbers. This action brings up the dialog below (next page).
- Step 2: The circle will tell you the available slot for both the teacher and the room.
- Step 3: Reschedule the section by clicking on the circle in the *Change* column and clicking *OK*.

Warning!

Pattern	Teacher: Merlin, David Carter	Room:	Change
FY 1(A)	O	S: 011-001	
FY 2(A)	S: 011-009	O	
FY 3(A)	S: 012-004	S: 011-008	
FY 4(A)	S: 012-005	S: 011-007	
FY 5(A)	S: 011-004	S: 013-001	
FY 6(A)	S: 012-003	S: 012-003	
FY 7(A)	O	O	◉

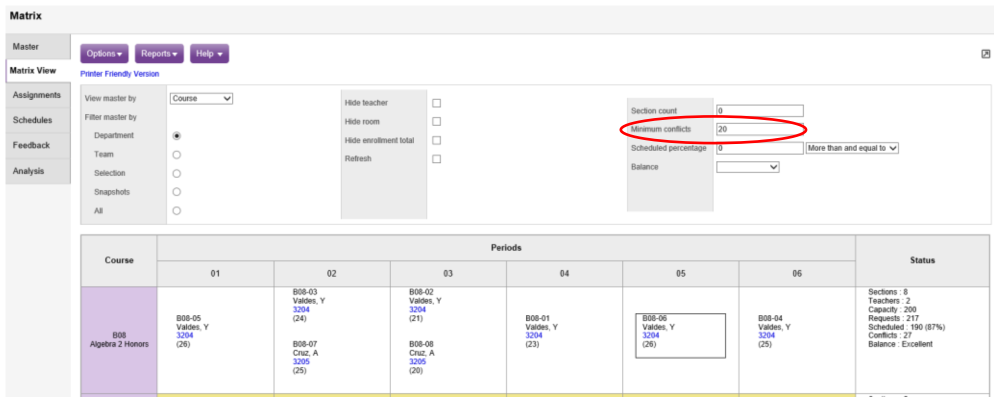
OK Cancel

After you make changes, RELOAD THE STUDENTS! But,
<u>Lock all student schedules that are complete (100%) prior to reload.</u>

Checking for Conflicts

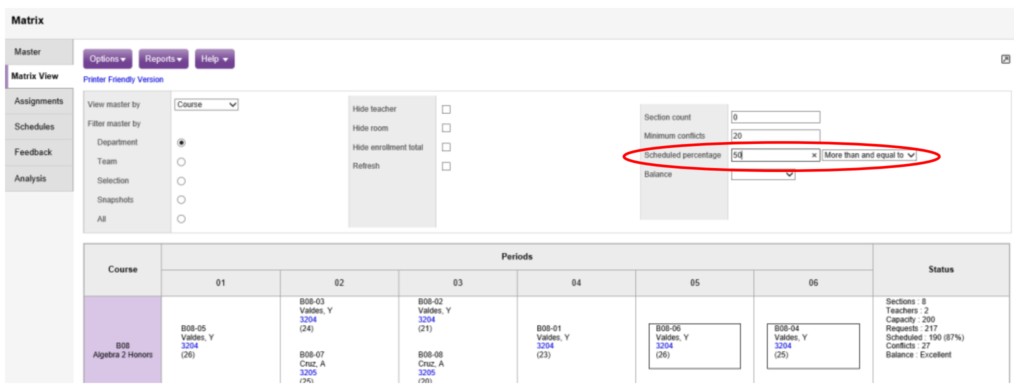
You can also use this Matrix View to check for highly conflicted courses and low scheduling percentages by using the filters at the top of the dialog at the extreme right side. For example, you can enter a high number in the *Minimum conflicts* field so that the view shows you only your most highly conflicted sections. (See below.)

Minimum Conflicts



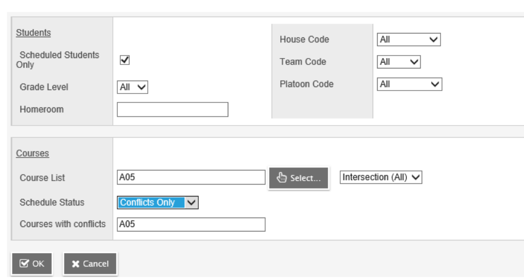
Or you can enter a low number in the *Scheduled percentage* field to see only those sections with a low number of students scheduled into them.

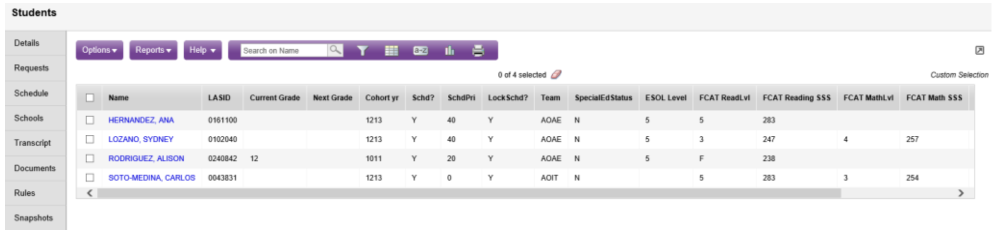
Scheduled Percentage



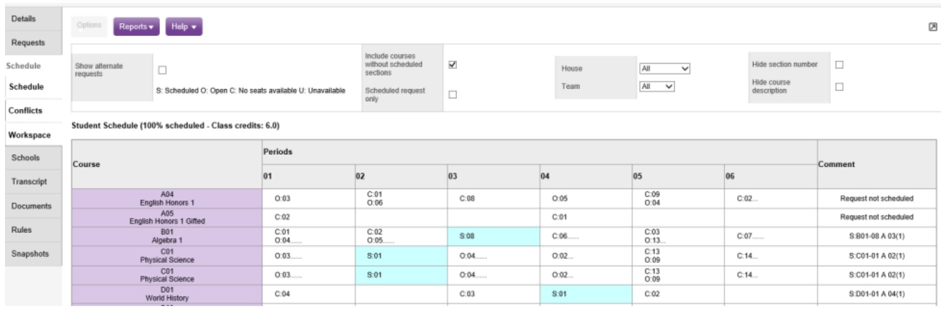
Now that you have found the highly conflicted courses which have a poor percentage of students scheduled into them, address the problem from the students' side.

- Step 1: Go to **TT: Student**.
- Step 2: Pull down the *Options* menu to *Filter Students*.
- Step 3: Enter the sequence number of the course the student requested.
- Step 4: Enter the course schedule status.
- Step 5: Click *OK*. The window below appears showing the list of students who did not get into the course.





- Step 6: Select the student and click on **ST: Schedule**, **SbT: Conflicts**.



- Step 7: Review the conflicts and make changes on **TT: Workspace**.

Committing the Schedule

After you complete the building and re-working your master schedule, you commit to that schedule. This is the schedule that appears in the School View next school year.

NOTE: Before you commit to a scenario (master schedule), be sure to change the number on your clone rooms back to the original room number.

NOTE: The details and procedure such as committing your final Master Schedule are provided each year with necessary due dates.

Appendix A

Warning! The primary scenario, i.e. the one you are copying, should have all of these items checked; the copy should have them unchecked.

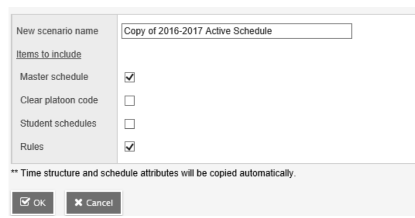
NOTE: Use this copy function only after you have created a master schedule.

Warning! The primary scenario, i.e. the one you are copying, should have all of these items checked; the copy should have them unchecked. For further explanation of this, please refer to the section entitled "Date Shared Across Scenarios," found on page 10 of this guide.

Copy a Build Scenario (Optional)

ONLY COMPLETED SCENERIOS SHOULD BE COPIED.

Several build scenarios can be created to maximize scheduling results or to attempt different versions of your schedule. To be safe, always copy the scenario and experiment with the copy.

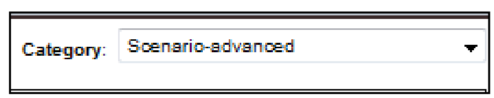


NOTE: If you copy a scenario from a different schedule build year, the system does not copy the term dates from that year.

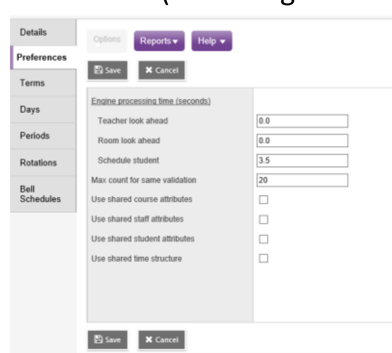
- Step 1: Go to **BV, TT: Scenario**,
- Step 2: Select the scenario you wish to copy and click on **ST: Details**.
- Step 3: On the *Options* menu, click *Copy Scenario*. The Copy Scenario dialog box appears.
- Step 4: Type a name for the new scenario.
- Step 5: Once you have the copy of the scenario, deselect the attributes before you begin to work within this copy.
- Step 6: Click *OK.* The screen changes to the copy of the scenario.

NOTE: If you do *not* deselect an attribute and you make a change that attribute, the system will change all the scenarios.

- Step 7: Click the **ST: Preferences**. The Preferences dialog appears.



- Step 8: Switch the Category to Scenario-advanced (on the right side of the dialog.)
- Step 9: Deselect those attributes that you wish to be unique to this scenario.
- Step 10: Click *Save*



NOTE: Use the *Scenario Data* below to guide you in making your selections.

Appendix B

Creating a Snapshot

NOTE: Be Careful! These Snapshots are *static* and will not automatically adjust for students moving in and out of your school.

In the future, use the Filter menu on the Scenarios page to view scenarios of both the current build year and any previous years.

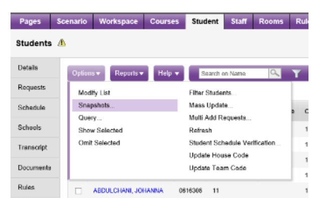
Think of a snapshot as a picture of a particular group of students, staff members, courses, or rooms that you can file and easily retrieve. For example, assume you manage the Math Club and want to be able to quickly access all of the students who are members. You can use a query to find the students initially, and then create a snapshot of these students. This way, each time you want to work with students in the Math Club, you need only refer to your snapshot

- Step 1: Click on one of the following tabs:

    1. To create student snapshots, click the **Student** tab.
    2. To create staff snapshots, click the **Staff** tab.
    3. To create course snapshots, log on to the Build view, and click the **Courses** tab.
    4. To create room snapshots, log on to the Build view, and click the **Rooms** tab.
    5. Step 2: Search for or select the records you want to include in your snapshot. You might select these records individually, or use a query to find them.

Note: Be sure to select the checkbox next to each record you want to include in your snapshot, pull the *Options* menu down to *Show Selected*.

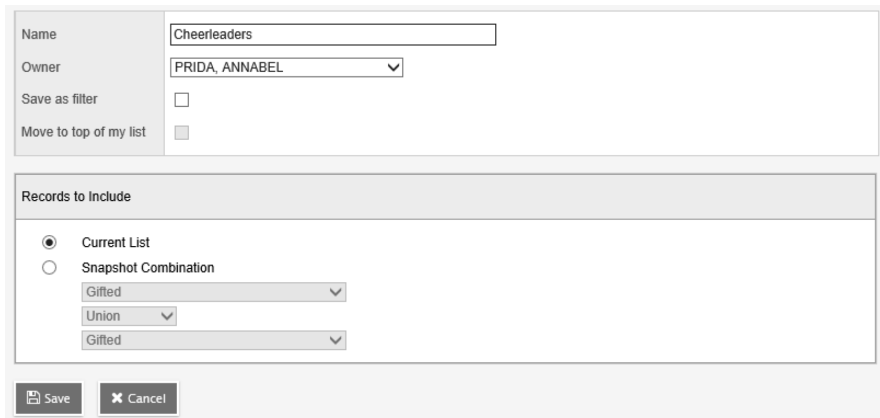
- Step 3: Pull the *Options* menu down to *Snapshots*.
- Step 4: In the *Manage Snapshots* dialog box, click *New*. The Snapshot Definition dialog box appears



- Step 5: Type a name for this snapshot.
- Step 6: At the *Owner* field, select the user, the school, or the district as the owner. This determines which other users, if any, can use this snapshot.
- Step 7: If you would like to make this snapshot an option on your *Filter* menu, select the *Save as favorite* checkbox.

NOTE: If you would like this snapshot to be your default filter (for example, whenever you open the Student List, these are the records you'd like to see), select the *Move to top* checkbox.

- Step 8: In the *Records to Include* box, select one of the following:
    - **Current List** to include only those records you selected checkboxes for on the list page.
    - **Snapshot Combination** to combine two existing snapshots. (This option is only available if you have already defined at least two snapshots.)



Then, use the following table to determine how you want to assemble the two snapshots you select:

Select	To include the following in the snapshot:
Union	Any records that appear in the first snapshot you select or the second snapshot you select. For example, if you want to create a snapshot of students who appear on either or both the first term and second term honor roll, select **Union**.
Intersect	Only records that appear in both the first and second snapshot you select. For example, if you want to create a snapshot of students who appear on both the first and second term honor rolls, select **Intersect**.
Difference	Any record that appears in the first snapshot you select, but not in the second. For example, if you want to create a snapshot of students who appear on the first term honor roll, but not on the second term honor roll, select **Difference**.

- Step 9: Click **Save**. The Manage Snapshots dialog box displays the snapshot you created.
- Step 10: Select the snapshot you created, and click **Use**. The list page displays the records in the snapshot selected.

Appendix C

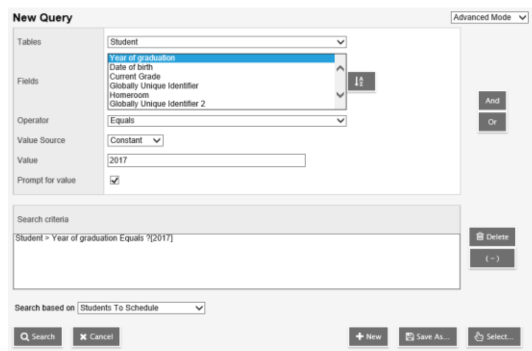
Query Function

Query Function

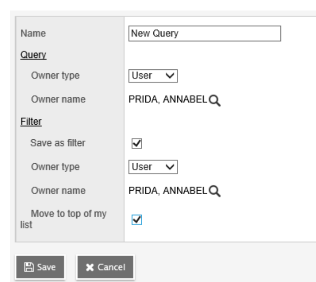
Queries can be written in either simple or advanced mode. When using the simply mode, you can write one query to show students in eighth grade and another query to show students in seventh grade. In the advanced mode, you can write a single query which includes a “wildcard” that will allow you to specify the grade level you wish to query each time the query is run. So you can create one grade level query for your entire school.

Queries can be run on students, staff, courses, or rooms.

- Step 1: Select the desired **TT** for the item you wish to query. From the *Options* menu, select *Query*. The New Query window appears.
- Step 2: Select Advanced Mode from the drop-down.
- Step 3: Select the desired parameters.
- Step 4: Place the check mark on *Prompt for Value*—this is the wildcard that will ask you to provide a value when you run the query again.



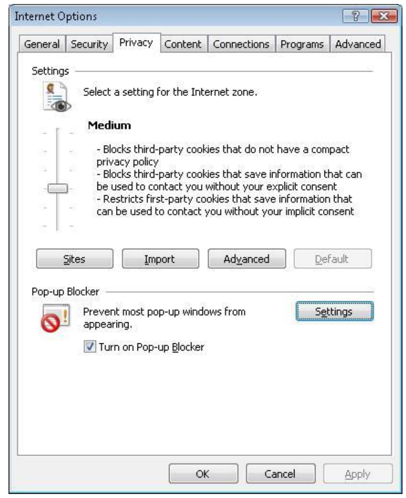
- Step 5: Click the *Add* button to add your parameters to create your query.
- Step 6: Check the *Search On* drop-down to verify what list you are querying on.
- Step 7: Click the *Save As* button if you wish to save this query for future use.
- Step 8: Name your Query.
- Step 9: Select *Save as Filter* to move this query to your filter list.
- Step 10: Select *Move to Top* if you wish this query to be first on your filter list.



Appendix D

Troubleshooting your Internet Settings

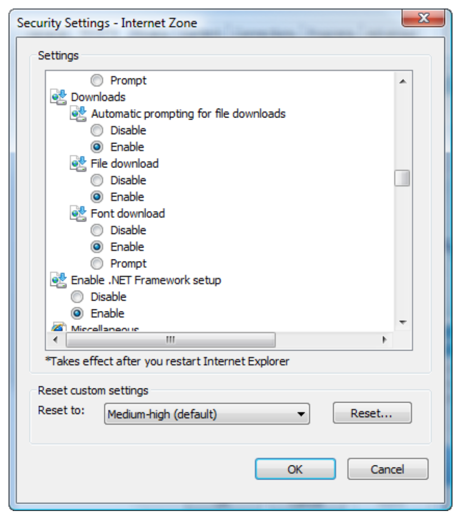
Once you access the Internet Explorer Options in the menu tab Click on the *Privacy* tab.



Click on the *Settings* button.

Type in https://schd.dadeschools.net/aspen

- Step 1: click the *Add* button.
- Step 2: Click on the *Close* button.
- Step 3: Click on the *Security* tab.
- Step 4: Click on the *Internet* icon if necessary.
- Step 5: Click on the *Custom level…* button. This action brings up the *Security Settings* dialog at the bottom right.
- Step 6: Scroll down to the *Downloads* section (almost half way down).
- Step 7: Under *Automatic prompting for the downloads*, click on the *Enable* setting.
- Step 8: Click *OK* to close the *Security Settings* dialog.
- Step 9: Click *OK* to close the *Internet Options* dialog.



Now, in the **TT: Workspace**, when you pull the *Options* menu down to *Build*, the server will download the scheduling engine to your computer and build the schedule locally.

Appendix E

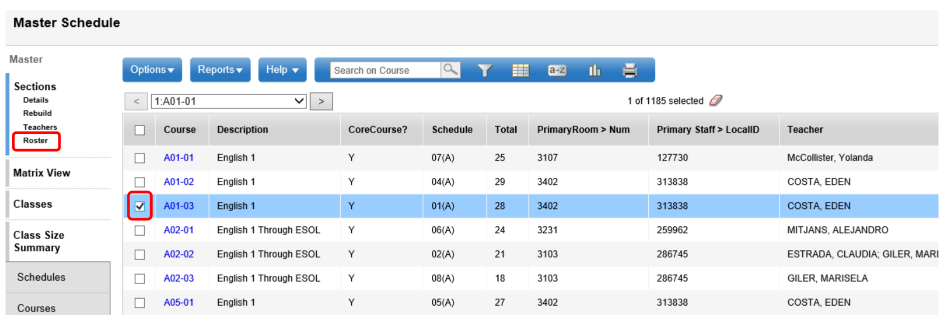
The PUSH/PULL Method

This method is to move a student or whole groups of students from one section to another. There are two options in this method. The first is the “PUSH” method. This involves the identifying of the exact section a student(s) are located in, selecting the correct student(s) and “pushing” them to another section that has been selected by you, the scheduler.

The second method is called “PULL” since you first access the section you would like your student(s) to transfer to and then locate the student(s) in the section in which the student is currently scheduled. Then you will execute the “PULL” command and the student will be brought in to the desired section.

The following example shows the “PUSH” method:

- Step 1: Locate the correct section number and click on the correct corresponding box to the left of the section number.
- Step 2: Once the precise course number has been identified, click on the “Roster” sub tab.



- Step 3: Now that the student class roster is available, select the students that need to be “pushed” out of the selected section. Then In the “Options” menu, use the “Show Selected” to isolate and move only those student(s). If all students are being transferred out, simply select them all.
- Step 4: Upon selecting and isolating the correct student(s), return to the “Options” menu and select the first choice “Add.”
- Step 5: Select the “Push” function in the first option for “Schedule Mode.” If you require that the student(s) be removed entirely from the section, check the box to the right of “Remove from current section.” Otherwise, the student(s) being pushed remains in this roster and scheduled for this section.
- Step 6: Click on the radio button to the left of “Current selection.” A total number of students that will be pushed will show next to the “Selected students” line and this number needs to correspond with the number you have intended to move out of this section.

- Step 7: Enter the correct section number that the student(s) will be sent to. Please take the time to ensure that the selected student(s) are going to the correct section. If you are unsure of the section number, click on the "Select" button and pick from the list of active sections.

Finally, click on OK to finalize your transaction.

For the "Pull" version, the same procedures are needed, but the section the student(s) will eventually land in must be identified first and then sequence will closely mirror the "Push" version.

Remember, UNDO is not an option.

Please gather your facts and plan of action before using any version of this method.

Appendix F

Creating Duties

You can create and assign duties to teachers in your school. To use duties, you copy the courses for them from the district catalog to your course catalog. Then, in the Workspace, assign them to teachers so that the duties appear in the teachers' schedules. The District has created 18 duties for you. To add all or any of these Duties to you course catalog,

Step 1: Go to **BV** **TT:Courses.**

Step 2: Pull the *Options* menu down to *Add.* The Course Pick List window appears.

Step 3: Switch the Course Catalog to the highest school year and *School Level* (S*) to *Admin.* In a few seconds you will see a list of all the duties in the district. (See Below.)

Step 4: Check the duties you wish to bring into your course catalog. **NOTE**: **You may only import a duty once.**

Step 5: Click *OK*.

Warning!
If you do not fill in these data, you will get a validation error.

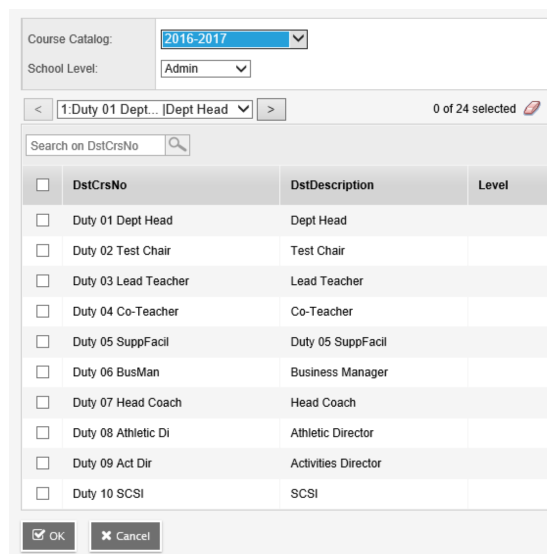
Step 6: Open each duty and fill in the appropriate data i.e., Include in scheduling, Base Terms, Cover Terms, Periods per cycle, and at least one section.

Step 7: Do not forget to *Save* your entries for each Duty.

Using Duties

Duties Available

Duty 01................ Dept Head
Duty 02................. Test Chair
Duty 03............Lead Teacher
Duty 04................Co-Teacher
Duty 05...Support Facilitation
Duty 06..... Business Manager
Duty 07.............. Head Coach
Duty 08........Athletic Director
Duty 09......Activities Director
Duty 10..........................SCSI
Duty 11...........Reading Coach
Duty 12..............Math Coach
Duty 13......................... GBM
Duty 14....................... H-Lab
Duty 15... Special Assignment
Duty 16....................Planning
Duty 17................. Counselor
Duty 18........ Media Specialist



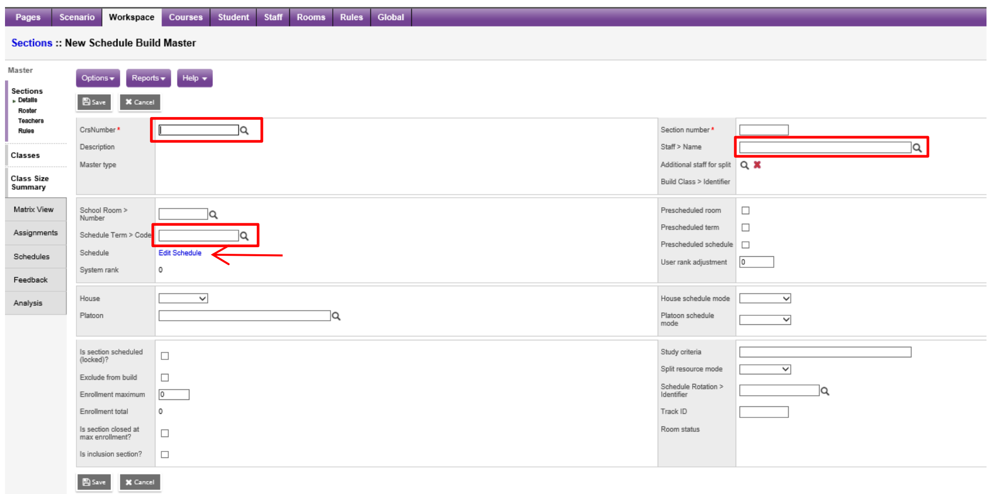
After you have imported the duties you wish to use, you will find them in your Build View under the Courses tab. To assign a Duty to a teacher, follow the steps below.

Step 1: Go to **BV**; ***TT:Workspace***.

Step 2: Pull down the *Options* menu to *Add*.

Step 3: When the blank dialog appears, use the magnifying glass to choose the Duty you wish to assign. The dialog will automatically pick the next section number.

Step 4: Fill in the following data. (See the picture and table below.)



Field	Information
1. Staff > Name	Use the pick list to choose the desired teacher.
2. Schedule Term > Code	Use the pick list to select A for annual.
3. Schedule	Click the Edit Schedule link, and then pick the period.

Step 5: Click the *Save* button. The Duty should now appear in the teacher's schedule at the designated period.

Step 6: Repeat Steps 1—5 for each duty you wish to assign.

Appendix G

Adding a Co-teacher or Inclusion Teacher

Adding a Co-teacher or Inclusion Teacher

- Step 1: Go to **BV**,**TT:Workspace**. **(**Also available in **SV**, **TT:Schedule**, **ST: Sections**.**)**
- Step 2: Select the section to which you wish to add a Co-teacher or Inclusion teacher.
- Step 3: Click on the **SbT**:**Teachers**. This action opens a dialog showing the Gen-Ed teacher.
- Step 4: Pull the *Options* menu down to *Add*. This action brings up a new teacher dialog.
- Step 5: Select the Teacher's **Name** from the magnifying glass pick list.
- Step 6: Select the **Term code** from the magnifying glass pick list.
- Step 7: Use the dropdown list to select the **Role** for the co-teacher or inclusion teacher.
- Step 8: Click the *Save* button to add the teacher.

Appendix H

Adding a Section to a Course

Adding a Section to a Course (Before the next school year starts)

- Step 1: Go to **BV**, **TT:Workspace**. The Sections will display.
- Step 2: Pull the *Options* menu down to *Add*.
- Step 3: Use the magnifying glass to select the Sequence for which you wish to add a section. The computer will automatically add a section with the next highest number.
- Step 4: Use the magnifying glasses to pick the Teacher, the Room, and the Term code.
- Step 5: Click on the blue *Edit Schedule* link to pick a period to schedule the new section, and click *OK*.
- Step 6: If you are using Houses or Teams, tag this section with the proper code.
- Step 7: Enter the Enrollment Maximum.
- Step 8: Check the box for "Is section closed at max enrollment?"
- Step 9: Click the *Save* button to make this section part of your master schedule.

Appendix I

Copying Students from One Section to Another

Directions for copying the students from one section to another

- Step 1: Open the section out of which you want to move students. (**BV**, **TT: Workspace**, **ST: Sections**)
- Step 2: Go to BV, TT: Workspace, ST: Sections, **SbT:Roster** to see a list of the students in that section.
- Step 3: Select the students you wish to move out of the section.
- Step 4: Pull the *Options* menu down to *Add. (*The Multi-Add Students window appears.)
- Step 5: Use the dropdown menu to change the schedule mode from *Pull* to *Push*.
- Step 6: Under Students, click *Current Selection*.
- Step 7: At the bottom of the dialog, use the *Select* button or type in the sequence ***and section*** (to which you wish to move the students. **NOTE**: Use the checkbox if you want to remove the students from the previous section.
- Step 8: Click the *OK* button to add the students to the other section.

REMINDER!

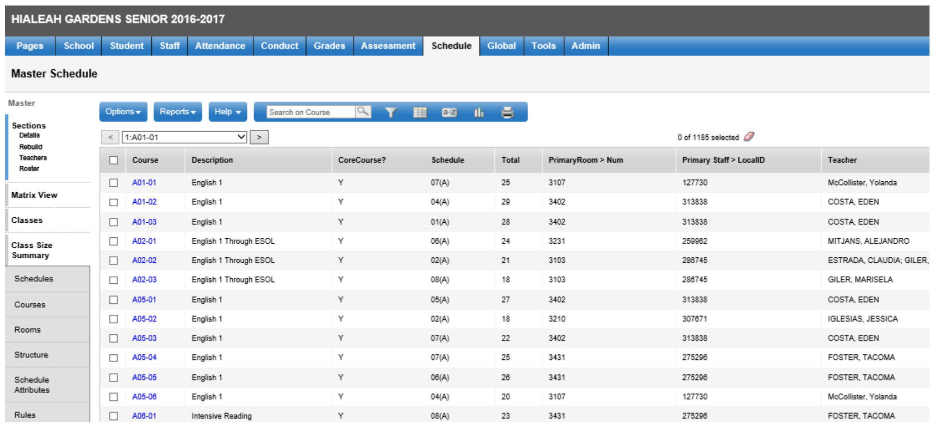
In the course of using X2 Aspen, you will be viewing courses, teachers, students, and rooms that have come over from DSIS. The first time you go to view this data in X2 Aspen, you will find an empty list until you pull the Options menu down to Refresh. In addition, if you add new students or rooms or courses in DSIS throughout the year, you will need to refresh those lists the next time you open X2 Aspen.

Additional Resources

Throughout X2 Aspen, you can use field sets to customize the columns that appear in a list. When you create field sets, you define the columns of information you want for every record on the page.

Using Field Sets

Manage your field sets in the upper right-hand corner of each page by clicking on the Field Set menu.
From this area of the page, you can modify an existing field set. To edit an existing field set, select ***Default Fields*** from the drop down list.

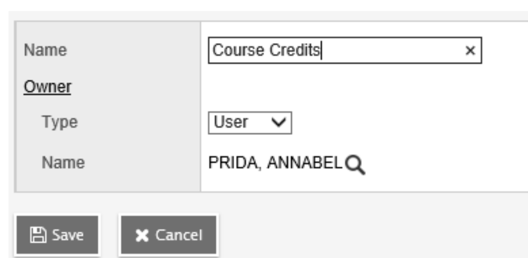


The Manage Field Sets dialog box will appear. Make a copy for yourself as a starting point for the new field set by selecting Default [district], then click *Copy.*

- In the **Name** field, type a Name of the New Field Sets.

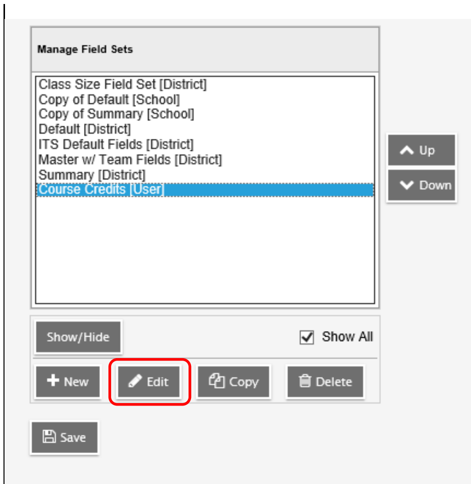
 At the **Type** field select User from the drop-down list.

- Click *Save*.



To Edit the Copied Field Set

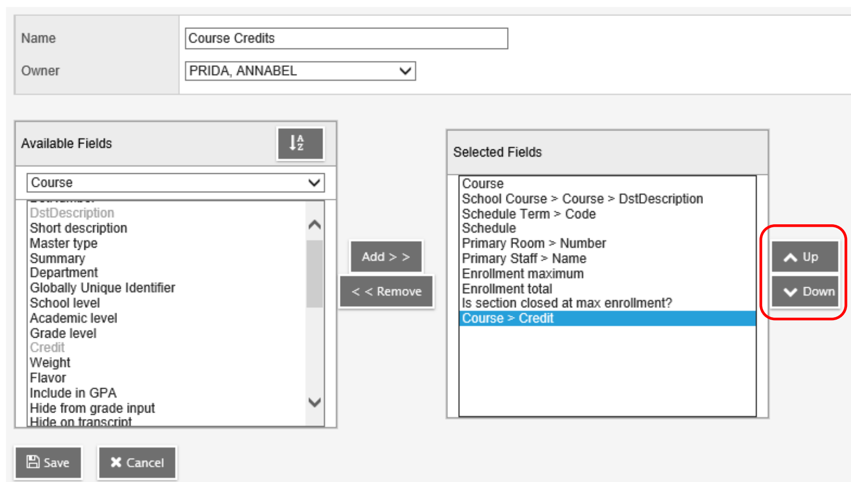
NOTE:
If you wish to make this new Field Set to be the default set, open the Manager again and move you new set to the top of the list.



Select copied field set (e.g. your user name) and click *edit.*
To Add/Remove fields from the Selected Field list, do one of the following:

- Hold the CTRL button and select the fields you want in your selection, click **Add**/***Remove.***
- Click each field one at a time, click **Add**/***Remove.***

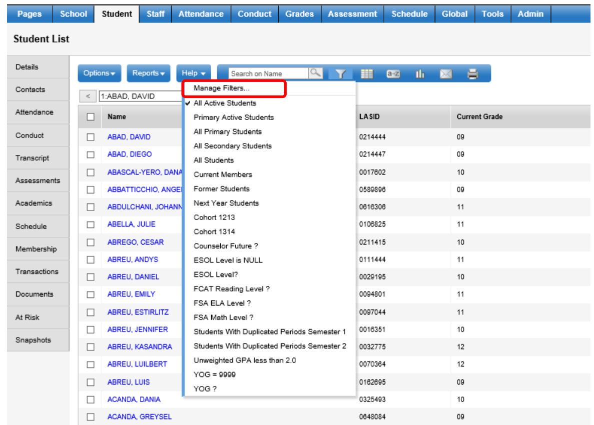
Click the **Up/Down** buttons to move the fields into the order that you want them displayed on your page. Click **Save** when the Selected Fields list contains all of the fields you want on your page, in the order in which you want them to appear.



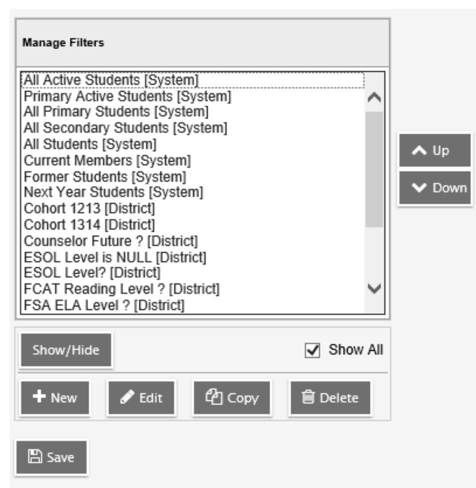
Choosing & Managing Filters

Use filters to search your school's Master Schedule for individual teacher or student schedules.

- Filters are available on all *tabs*. The list displays according to the filter that is first in the list.



- Select the tab you wish and click on the Filter icon to see the list of filters.
- Select the filter you want to use. The list changes to reflect your choice.
- If you wish your list to *default* to this filter, click on the filter icon and choose *Manage Filters*.
- The Filter Manager appears.
- Highlight the filter you want to use as the default.
- Click the *Up* button until that filter moves to the top of the list.
- Click the *OK* button to confirm your choice.
- Now your list will open every time you navigate to it and display according to your default filter.

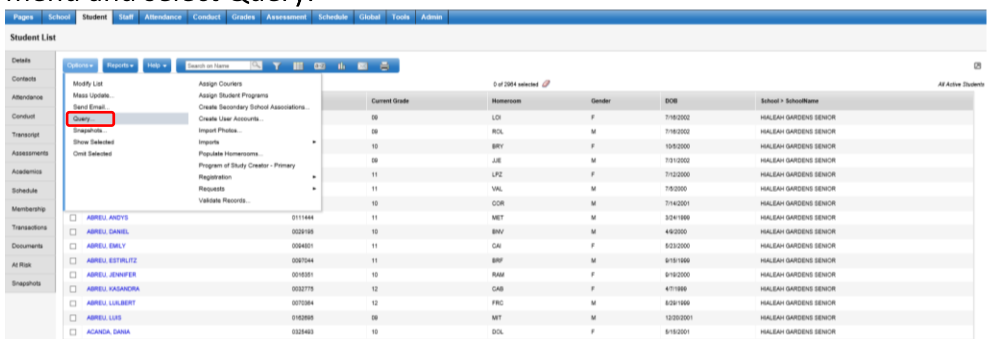


Queries

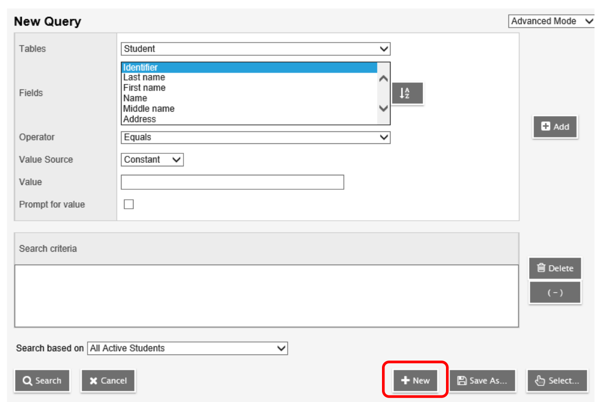
You use queries to find a group of records that match specific criteria at a particular time from a list page. For example, you can perform a general search for a group of students with the same year of graduation, or a more specific search for students in the same graduating class in a particular homeroom.

The Query search tool is accessed from the Student, Staff and Schedule tabs in the blue School View mode.

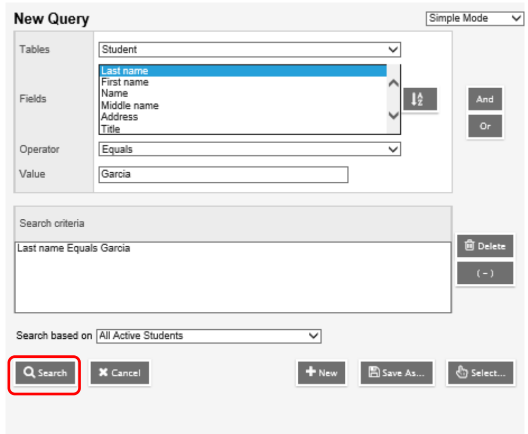
To perform a Query search, select the tab you require, and in the Options menu and select Query.



A “New Query” search window appears and is ready for your input. Once you have selected the Table, Field, Operator, and Value, click on the *Add* button to see your search in the bottom of the window.

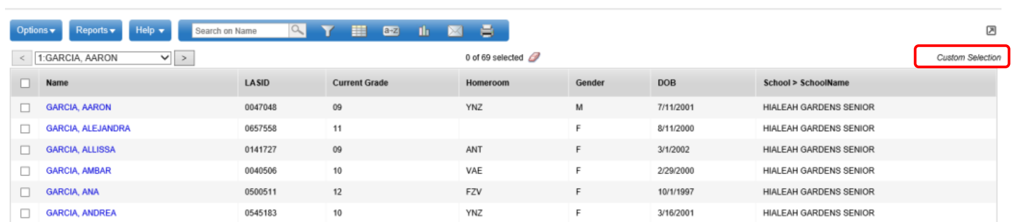


Click the *Search* button to generate the information requested. You will also have the choice of saving your search for faster access at a later time.



Your search will generate a new list based on all parameters given to the database. This process can be repeated as often as you require new data sorts.

ALERT:
Note that the filter now says "Custom Selection". To return to the full list, change the filter back to the regular default filter.



Appendix J

Frequently Used Aspen Reports

Desired Data	Report Name	Report Menu Location
List of Classrooms	Classroom Schedule Attributes	BV, TT:Rooms
Teacher List	Teacher Schedule Attributes	BV, TT:Staff
Assignments by Teacher	Teacher Assignments	BV, TT:Workspace
Teacher not scheduled by period (Periods teachers are free)	Unscheduled Teacher	BV, TT:Staff BV, TT:Workspace
Student Requests by Sequence	Course Request Verification	BV, TT:Student, BV, TT:Courses
Student Requests by sequence and course name (Proof list by Pupil)	Student Request (Landscape)	BV, TT:Student
Schedule (Matrix)	Student Schedule (Matrix)	BV, TT:Student BV, TT:Workspace
Schedule (Sheet)	Student Schedule (Sheet)	BV, TT:Student BV, TT:Workspace
Too Many, Too Few, or No Requests	Course Request Verification	BV, TT:Student, BV, TT:Courses
List of requests by course (Proof list by course)	Course Request List	BV, TT:Courses
Requests by Sequence	Course Request Verification	BV, TT:Student, BV, TT:Courses
Number of students requesting a course	Course Tally	BV, TT:Courses
Course Tally with Section Count	Course Tally with Section Type	BV, TT:Courses
Student Schedule Breakdown (Under/Over/Unscheduled)	Student Schedule Breakdown	BV, TT:Workspace
Schedule Statistics	Course Schedule Summary	BV, TT:Workspace
Master Schedule	Master Schedule	BV, TT:Workspace
Teacher Utilization	Teacher Utilization (8 Periods)	BV, TT:Workspace
Teacher Schedule	Teacher Schedule	BV, TT:Workspace
List of rules created under each type	Schedule Rule Summary	BV, TT:Rules