

USING THE CONCURRENT TERM EDITOR – A GUIDE FOR THE SECONDARY SCHOOL ROLLOVER

MiSiS Master Scheduling Team & Division of Instruction

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Concurrent Term Editor

(Fall to Spring Rollover/10-week rollover)

Step 1: SET-UP

The Concurrent Term Editor is used to roll-over courses for the following terms:

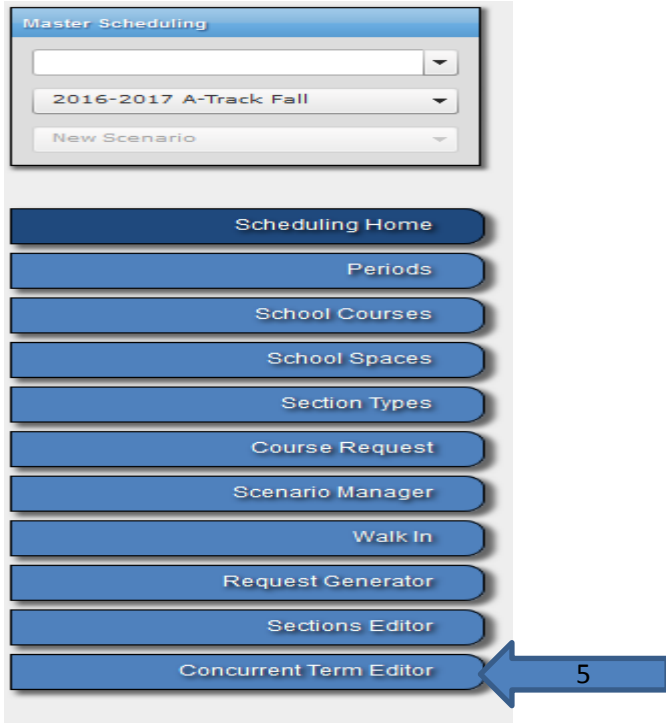
- Fall to Spring
- 4X4 First Half to Second Half
- 10 Week Wheel Courses

The Concurrent Term Editor allows sections to be mapped so that whole classes can move from one term to another. The user must decide which sections are to be mapped from the Source Term (Example: 2016-2017 A-Track Fall) to the Target Term (Example: 2016-2017 A-Track Spring). The auto populate feature has the ability to populate the source and target terms automatically (Ex: English 9A–SH will be automatically mapped to English 9B-SH). When clicking on the Auto Populate button, the source term will be populated with all sections from the Sections Editor screen. Please note that only sections that are active will appear on the drop-down. For example, a World History A section was closed on 10/1/16 (before the end of the fall term, 12/16/16), the section will not appear in the Source Term and it will not map for the Target Term. Additionally, sections that are active until the end of the term (fall term ends on 12/16/16) and have no students enrolled, will display in the Source Term and will map to the Target Term. The target term drop-down will be populated with the next sequential course (Ex: CC Math 6A-C1 in the source will automatically map to CC Math 6B-C1 in the target). It will also list all of the sections from the source term listed in the Sections Editor screen. If a school wishes to map a section to the same section in the target term, all of those sections will appear in the drop down menu. For example, schools may determine that the fall section of English 9A- RSP will rollover to the same English 9A- RSP section in the spring.

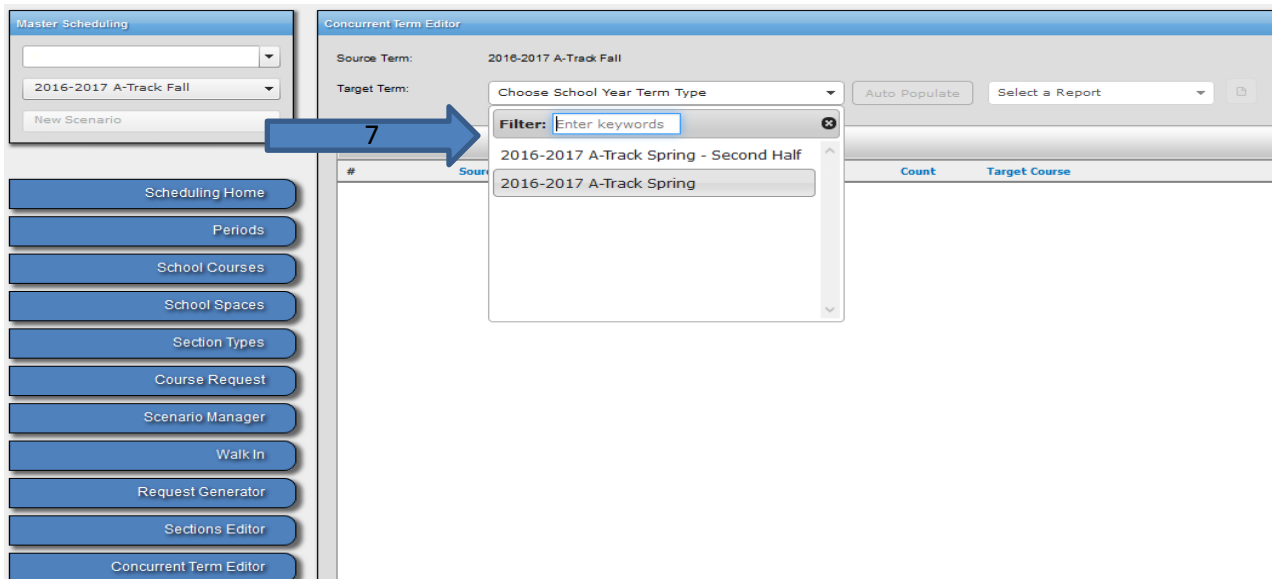
To set up the Concurrent Term Editor:

1. Log in as Scheduling Admin.
2. Click on “Admin” Tab
3. Select “Master Scheduling”

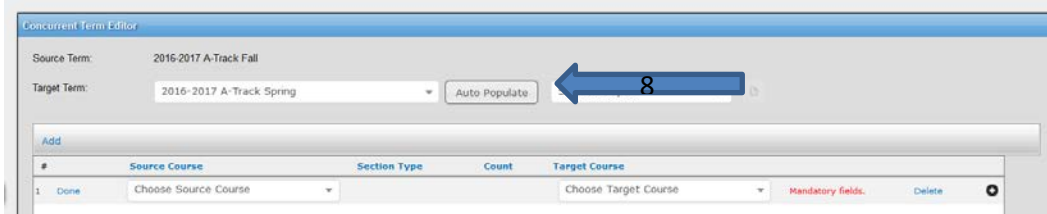
- 4. Select "Term" (ex: A Track Fall Term if rolling from Fall to Spring semester)
- 5. Select "Concurrent Term Editor" Tab



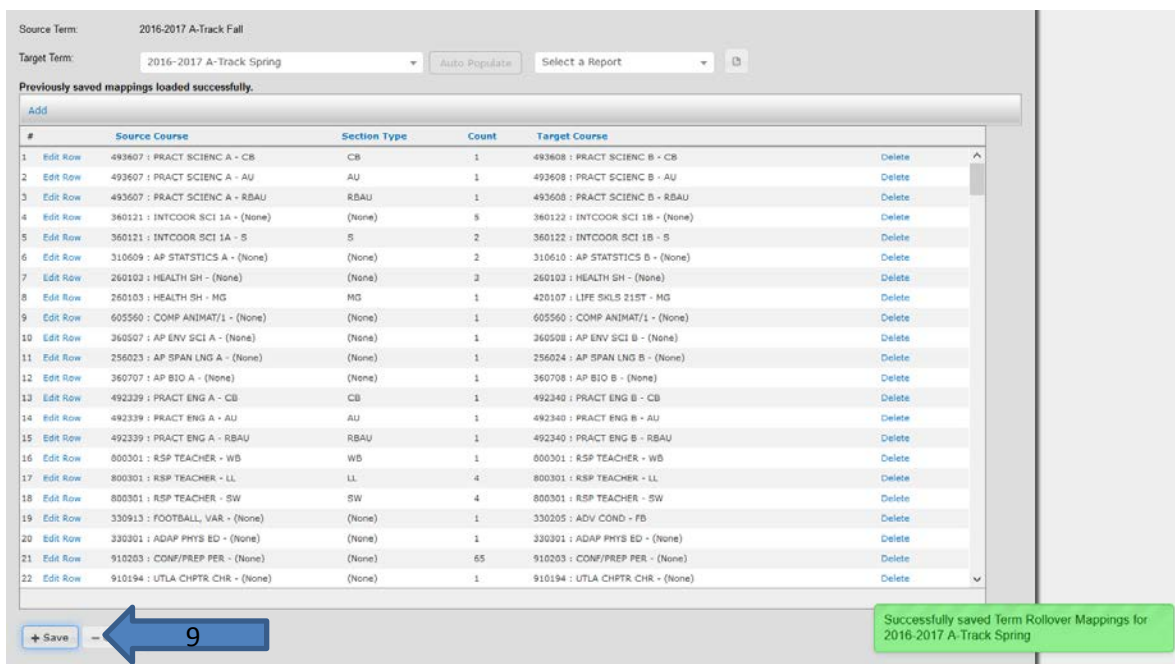
- 6. The Source Term defaults to the current term (Example: 2016-2017 A-Track Fall)
- 7. Select the Target Term in the drop-down (Example: 2016-2017 A-Track Spring)



- Click on the Auto Populate button. Annual courses will be mapped to the next sequential course. For example, English 9A- SH will map to English 9B- SH. Also, courses that are semester long but have a counterpart course (as determined by the Division of Instruction), such as Economics to Principles of American Democracy and Science 7 to Health JH, will have a mapping. If selecting semester courses that do not have a counterpart, please note that those will not be populated in the Target Term. You will need to determine which course will be offered. For example, Intro. to Comp. is a semester-long course, you will need to select another course in the Target Term.

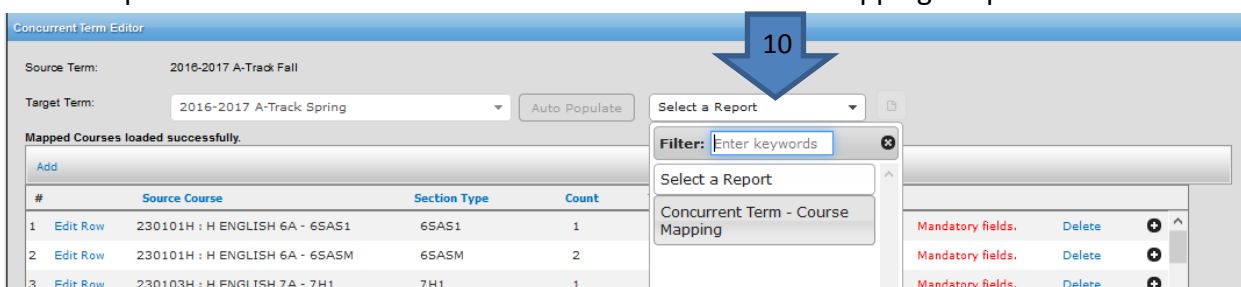


- Click on "Save" as you work on your course mappings. A box will appear with a question to confirm saving the mappings. Click "Yes" to save the mappings. You will receive a confirmation message that the mappings were successfully saved. Please note that once the mappings are saved and you attempt to edit or delete a section in the fall Sections Editor screen, an error message will display preventing the edit or deletion from taking place. The mapping must be deleted in the Concurrent Term Editor screen first before making a change in the Sections Editor screen.



Step 2: BUILD

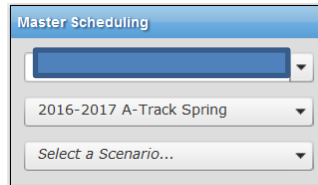
10. Select and print the “Concurrent Term-Course Mapping” report from the top of the Concurrent Editor Screen. This report should be reviewed to verify source and target terms mappings before committing the master schedule. If there are blank course mappings in the target term please see step 11. If the target course does not display in the dropdown, please see Step 12. The report will print in a PDF format. If the report is needed in Excel or CSV, go to the Reports Menu and select the “Concurrent Term-Course Mapping” Report.



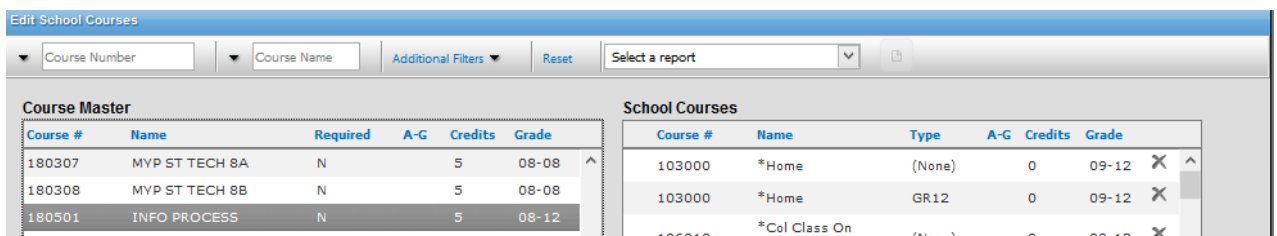
11. Only annual courses and semester long courses pre-determined by the Division of Instruction, will be created in the target term for courses in the source term. If a course is a semester long course, the target course will be left blank with a red message entitled “Mandatory Field”. The Mandatory Field warning will be removed once the target course is updated. To update the Mandatory Field row, click on the “edit row” link. This allows the drop-down menu to display and select the course. To map a target course and section select a target course section from the drop-down menu. If you do not, you will not be able to commit the term. If a mandatory field is deleted because there is no direct mapping for the spring term, please note that all students scheduled in the source course, will have a hole in their class schedules.

#	Source Course	Section Type	Count	Target Course
1	230105 : ENGLISH 8A - B SH	B SH	1	230106 : ENGLISH 8B - B SH
2	230105 : ENGLISH 8A - E SH	E SH	1	230106 : ENGLISH 8B - E SH
3	230105 : ENGLISH 8A - G SH	G SH	1	230106 : ENGLISH 8B - G SH
4	230106 : ENGLISH 8B - E SH	E SH	1	Mandatory fields.
5	230106 : ENGLISH 8B - G SH	G SH	1	Mandatory fields.
6	230107 : ENGLISH 9A - B SH	B SH	1	230108 : ENGLISH 9B - B SH
7	230107 : ENGLISH 9A - E SH	E SH	1	230108 : ENGLISH 9B - E SH
8	230107 : ENGLISH 9A - G SH	G SH	1	230108 : ENGLISH 9B - G SH

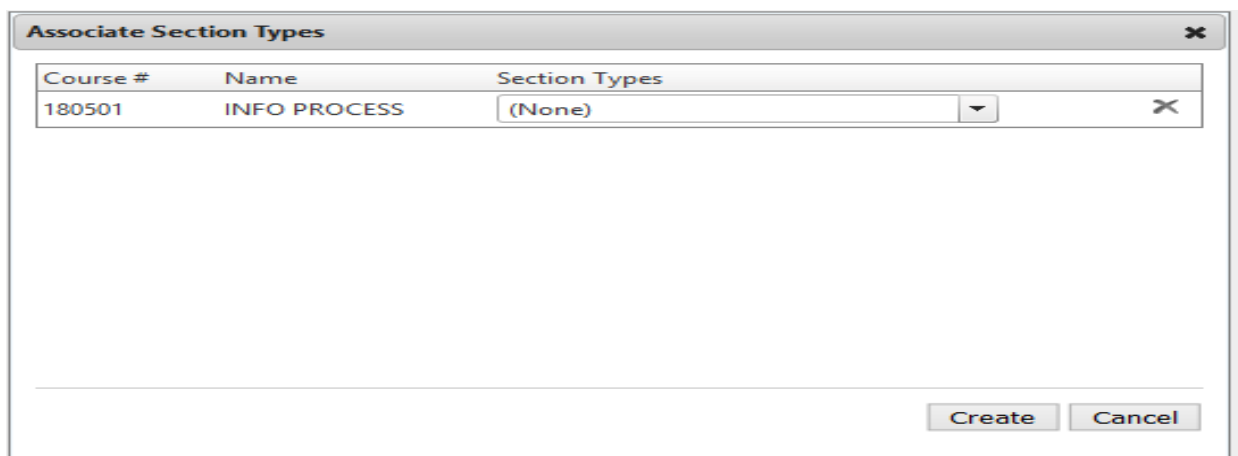
12. The Target courses will display all courses and sections that were offered in the Fall term. If the course is not found in the target term, you will need to add it to the Spring term School Courses screen. To add the non-annual course to the Spring term School Courses screen, navigate to the target term (Ex: Spring). In the example below, the uncommitted target term will be 2016-2017 Spring.

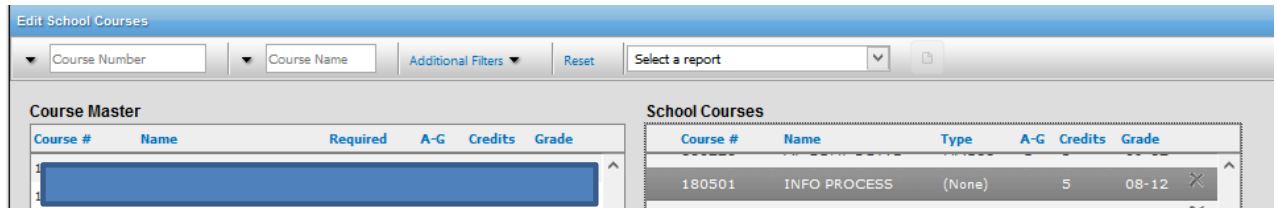


Once the term has been changed, navigate to the School Courses screen. Select the intended course from the District Courses screen (on the left side of the screen) and drag it over to the School Courses section (on the right side of the screen). In the example below the course Info Processing will be offered in the Spring as a new semester course.

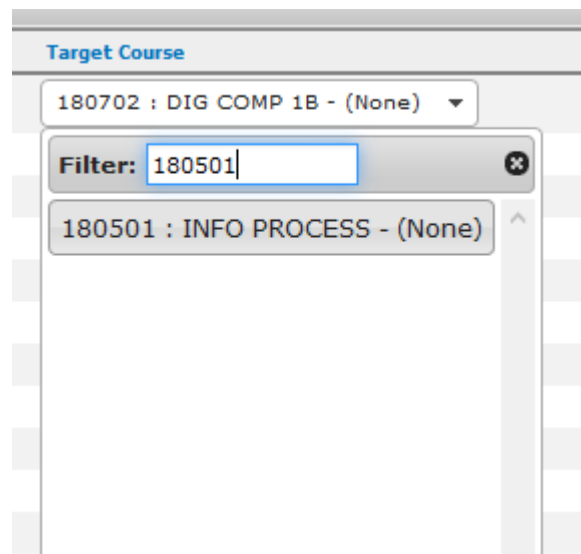


When dragging courses over from the Source Term to the Target Term, section types must be associated. Select the section type for the course and click ok. This course and section type will now be a part of the Target Term School Courses and made available for mapping. In the example below the section type of none is associated to the course Info Process:

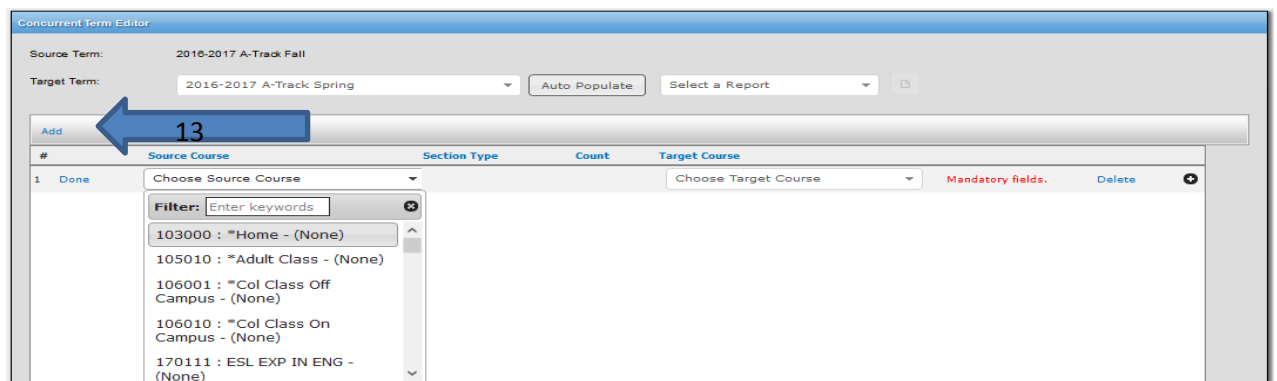




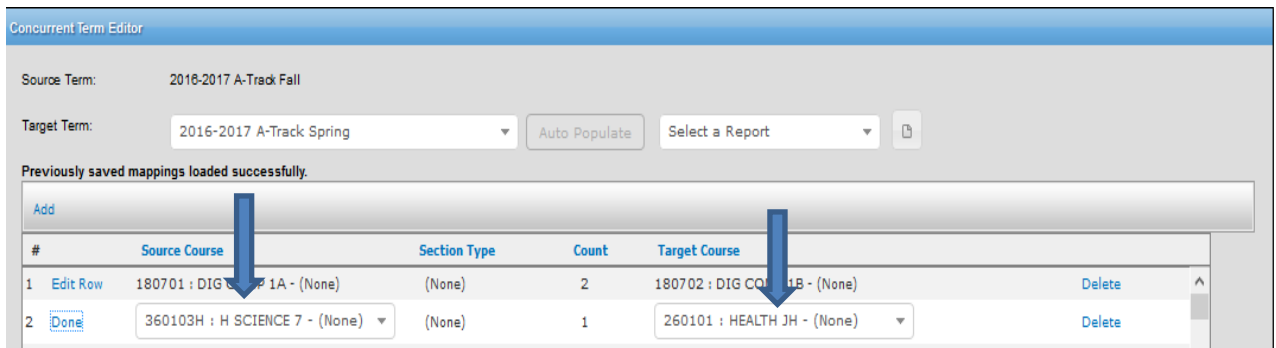
Change the term to the committed term (2016-2017 A-Track Fall) and Return to the Concurrent Term Editor screen to continue mapping. All newly added courses will be listed in the Target Term drop-down.



- Concurrent Term Editor also allows you to Add Course Mappings one by one. To do so, click “Add” to begin selecting the Source Course from the drop-down menu and its corresponding Target Course from the drop-down menu.



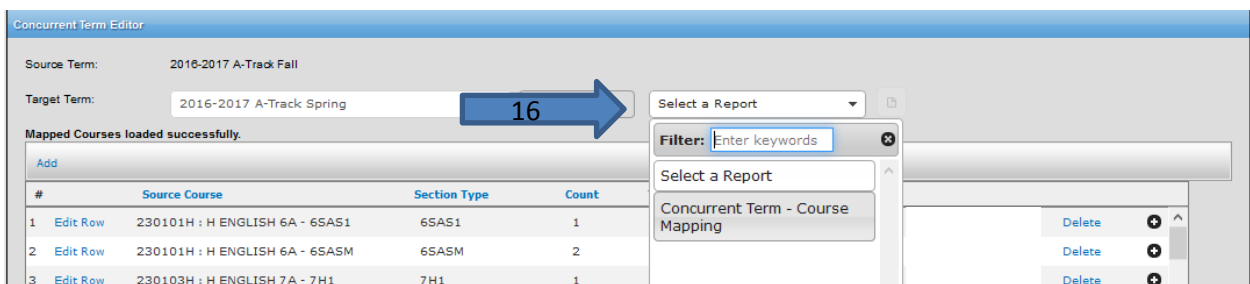
- The Edit Row link allows the source and target term to be updated. To update a target course, click on the Edit Row link. The source and target term drop-downs will be available in editing mode for selection and updating.



15. The Delete link allows a course and section to be deleted. Please note that the COUNT column displays the number of course sections that will be deleted. To delete a row and all of the course section counts, click on Delete and then click on Save.

#	Source Course	Section Type	Count	Target Course	Delete
1	230105 : ENGLISH 8A - B SH	B SH	1	230106 : ENGLISH 8B - B SH	Delete
2	230105 : ENGLISH 8A - E SH	E SH	1	230106 : ENGLISH 8B - E SH	Delete
3	230105 : ENGLISH 8A - G SH	G SH	1	230106 : ENGLISH 8B - G SH	Delete
4	230106 : ENGLISH 8B - E SH	E SH	1		Delete
5	230106 : ENGLISH 8B - G SH	G SH	1		Delete
6	230107 : ENGLISH 9A - B SH	B SH	1	230108 : ENGLISH 9B - B SH	Delete
7	230107 : ENGLISH 9A - E SH	E SH	1	230108 : ENGLISH 9B - E SH	Delete
8	230107 : ENGLISH 9A - G SH	G SH	1	230108 : ENGLISH 9B - G SH	Delete

16. Rerun the “Concurrent Term-Course Mapping” report from the top of the Concurrent Editor Screen in PDF or from the Report Menu for a CSV or Excel file. This report should be reviewed to verify source and target terms mappings before committing the master schedule.



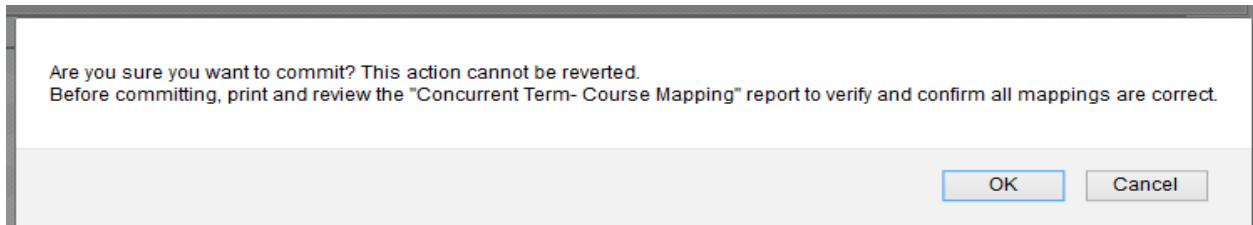
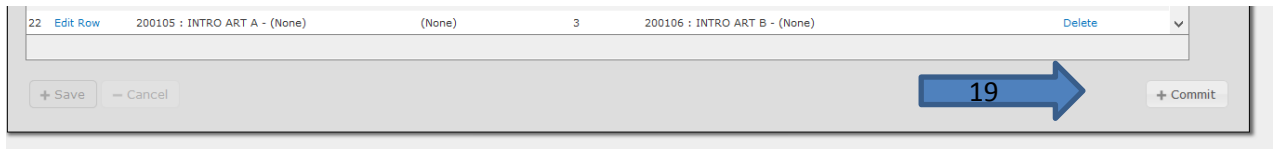
17. The report will display the source term course information as well as the target term course information. The target term section number will be blank until the target term is committed.

Source Term: 2016-2017 A-Track Fall □ A-Track Fall							Target Term: 2016-2017 A-Track Spring □ A-Track Spring							
Course Number	Abbreviated Course Name	Section Type	Period	Room	Teacher	Section Number	Enrollment Count	Course Number	Abbreviated Course Name	Section Type	Section Number	Enrollment Count	Created By	Created Date
200209	DES CRAFT A	B	4	MO		6	3	200210	DES CRAFT B	B		3		11/10/16
		B	5	MO		7	3	200210	DES CRAFT B	B		3		11/10/16
		E	3	E2		9	0	200210	DES CRAFT B	E		0		11/10/16
		E	4	E2		10	1	200210	DES CRAFT B	E		1		11/10/16

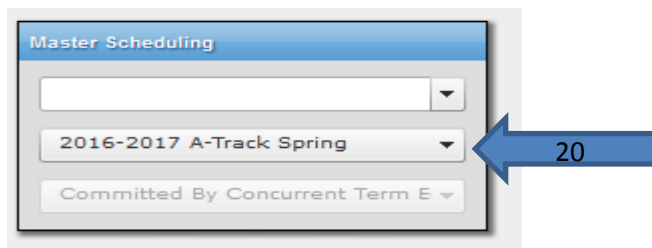
18. Finalize all mappings in the Concurrent Term Editor before committing.

Step 3: COMMIT

19. To Commit the new term, click on “Commit” to rollover the master schedule to the desired term (Fall to Spring). A confirmation message will appear to confirm your request to commit. Click OK to commit the mappings.



20. Go to the new term on the Master Scheduling screen. On the “Master Scheduling” grid, located on the top left corner, select the new term from the drop-down menu. A new committed scenario will appear in the third box. You may begin working on Sections Editor or Walk-in Scheduler as needed.



Step 4: MAINTAIN

When you commit a scenario- new tabs appear – Walk-in Scheduler and Sections Editor.

21. Walk-in Scheduler

- a. Make changes or add classes to an individual student's schedule.

Keeping the following in mind:

- i. Adjusting Student Schedules before the Start of the Semester - When making a schedule change for a class prior to the start of the first instructional day, the new section change will appear with a green box and the previous section will be replaced. The section start date will be as of the first instructional day. After change is made, click the file icon to SAVE the change. The Add/Drop report will not generate any data as the class changes were made prior to the start of the semester
- ii. Making Class Changes During the First Instructional Day and Thereafter - On the first day and thereafter, you will face 2 possible scenarios:
 1. Changes when attendance has been submitted for a class
 2. Changes when no attendance has been submitted for a class

The Add/Drop report will generate the changes made to the student's classes.

Note: If a class change was made today (before a class begins) and attendance has not been taken, the end date for the course is the day before because that is the last date of attendance to that class. To print the Add/Drop report the user will have to change the date at the top of the screen before printing the report on the screen.

22. Sections Editor

- b. Searching for Sections – search by:

- i. Course name or course number
- ii. Teacher name
- iii. Clicking on the magnifying glass allows you to search by period, room, type, min size, max size, min capacity, max capacity, or group.
- iv. The gear button allows you to select an option to display future sections, past sections, view logs, and offers a reset option to clear the search criteria.

- v. The “sort by” button allows you to sort by Capacity, Class Size, Remaining Capacity, Course Name, Course Number, Period and Teacher
 - vi. The “asc” button lists choices in ascending or descending order
- c. Add New Sections – click on the “*New Section” button and a pop-up window “Section Details” will display. Select new Course, Section Type, Teacher, Room, Period, Spanned Periods (optional), Capacity, Start Date, and End Date. The section type drop down will only display the associated courses.
- i. Section Attributes- identify attributes of particular sections
 - ii. Edit the section- make changes to the selected section
 - iii. Drop the section - note: if students are enrolled in a particular class you are trying to delete, you need to move them first before the system will allow you to delete the course.
 - iv. “Link” courses (optional)- ability to link courses so that one will precede the other. To link classes, use control key while clicked on first class and then click on the other then click “Link” button.
 - v. “Combine” courses (optional)– allows you to select multiple classes offered in the same period, room, and with the same teacher. To combine classes, use control key while clicked on first class, click on the other(s) then click “Combine” button. The Combine Sections pop-up window displays the total capacity of both sections (non-editable) and lists the classes selected
 - vi. “Separate” courses (optional) – this gives you the option to separate linked or combined courses
- d. Add Off-Site Sections – you may add a section from a school on your campus by using the Add Off-Site Section option. Click on “Add Off-Site Section” and a pop- up will display. Fill in appropriate Local District, School, and Term. A list of available sections will populate. Select the appropriate section and click “Add Selected Off-Site Sections” button. This section will now appear in Sections Editor.
- e. Make mass changes to students’ schedules:
- i. Move Students – this option allows you to select a student or students and move them to another class
 - ii. Remove Students – this option allows you to end the student enrollment in that section
 - iii. Add Students – this option allows you to add selected students to another section

- iv. Make Working Groups- this option allows you to select a particular set of students and work with them in a group to edit sections
- v. Edit Walk-Ins – this option allows you to edit a student or students schedule in Walk-In

Move Students – A pop-up window will appear when selecting “Move Students” option. You may select course by name or number and by teacher. You may sort by various order in “Sort by” drop down menu and you may list in ascending or descending order by clicking the “asc” icon. It is very important to review the effective date of enrollment into the section and click “Submit Changes.” Option is also given to “Cancel” selection.

Remove Students – this option allows you to remove the student from the selected section on the effective date.

Add Students – this option allows you to add students from one section into another section- a pop-up window will appear when selecting “Add Students” option. You may select course by name or number and by teacher. You may sort by various order in “Sort by” drop down menu and you may list in ascending or descending order by clicking the “asc” icon. It is very important to review the effective date of enrollment into the section and click “Submit Changes.” Option is also given to “Cancel” selection.

Make Working Group – this option allows you to select students to work in a group-like function to edit classes. There is also an option to “Clear Working Group” when done.

Edit Walk-Ins – this option allows you to edit selected students schedules in the Walk-In Scheduler

Reports to use in scheduling:

- Student Schedule Summary – displays the students’ schedules in mass. You can also search for students with partial schedules, full schedules, and no schedules. School user may choose to sort by grade or by alphabetical order by student name. In the report parameter page, you may add a page break by teacher, groups, and grade levels
- Student Program – displays the individual student schedule.
- Add/Drop – displays the student schedule changes. Changes to classes must consider when attendance was taken in classes- For example, you must enter a drop date for one class on day one and start the begin date of the new class on day two.

- Class Enrollment – displays the enrollment counts for all courses selected.
- Placement of Special Education Students – displays schedule for special education students.
- Potential Course Deficiency – displays students who have failed a course requirement and are not scheduled to take this same course.
- Repeating Courses – displays students who are repeating courses and need to be changed from the current schedule.

CONCURRENT TERM EDITOR CHECKLIST

A Checklist for Secondary Schools

Set-Up

- Sign in as Scheduling Administrator
- Click on Admin, select Master Scheduling
- Click on the Concurrent Term Editor from the current term
- The Source Term automatically populates
- Select Target Term (Ex: 2016-2017 A Track Spring)
- To Map Courses click on the Auto Populate button
 - All annual courses will be automatically mapped and those semester long courses determined by the Division of Instruction to be mapped
 - All semester courses will have to be inserted by clicking the Edit Row link and updating the course by selecting the course section from the Target Term drop down
 - If a course is not displayed in the Target Term, the course must be dragged into the School Courses screen of the Target term (Ex: Spring Term) before displaying in the Concurrent Term Editor drop down for the target term.
- Save Mappings

Build

- Run and Review Concurrent Term Mappings Report
 - This report can be run from the screen in a PDF or from the Reports Menu in CSV or Excel
- Review/Edit Mappings
 - Use the Delete link to delete unwanted mappings
 - Use the Edit Row link to update any mappings
 - Click Save to keep the edits

Commit

- Finalize all course mappings
- Commit the target term mappings by clicking on the Commit button

Maintain

- Run and Review the Following Reports:
 - Student Schedule Summary
 - Class Enrollment
 - Student Program
 - Add/Drop
 - Placement of Special Education Students
 - Potential Course Deficiency
 - Repeating Courses
- Use Walk-In Scheduler to Edit Student Schedules
 - Reminder – please ensure that the section start and end dates are correct when changing student schedules after the school year has begun
- Use Sections Editor to Update/Add New Teacher Sections or to *Move, Remove, or Add students* to sections