LINN BENTON LINCOLN EDUCATION SERVICE DISTRICT

Information Systems Program
User Manual

Elementary Scheduling

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The School Year at a Glance

Important tasks for the Master Scheduler, Office Manager, Registrar

This calendar is a general guide to tasks to be completed during the school year. You may share some of these duties with another staff person. You may have additional duties not shown here; those may be found in the User Guide for another role.

July ✓ ✓ ✓	**August** ✓ Finalize Master/Student Schedule ✓ Schedule New Students ✓ Assign WebSIS Teacher/Advisor	**September** ✓ Send Schedules to Gradebook ✓ Add/Update Schedules ✓
October ✓ Verify ALL students have a schedule ✓ Add/Update Schedules ✓	**November** ✓ Verify ALL students have a schedule ✓ Add/Update Schedules ✓	**December** ✓ Verify ALL students have a schedule ✓ Add/Update Schedules ✓
January ✓ Verify ALL students have a schedule ✓ Add/Update Schedules ✓	**February** ✓ Verify ALL students have a schedule ✓ Add/Update Schedules ✓	**March** ✓ Verify ALL students have a schedule ✓ Add/Update Schedules ✓ ✓
April ✓ Begin Next Year Scheduling Prep ✓ Determine Next Year Teacher Assignments ✓	**May** ✓ Teachers develop Next Year Class Lists ✓ Create Next Year Master Schedule ✓	**June** ✓ Complete Next Year Master Schedule ✓ Load Student Course Requests ✓

Notes:

4 ELEMENTARY SCHEDULING

Overview

Next year schedule preparation starts with the creation of a new year database. You must contact LBL Information Systems Help Desk to create the next year district database for all schools in the district. District calendar start and end dates are required. The SILK Scheduler icon will be added to the access portal for designated master scheduling staff only.

The following screen functions are commonly used throughout the SILK Scheduling process:

 SEARCH for records

 ADD new records

 SAVE changes or new records

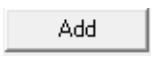
 REFRESH screen

 Scheduling Status Checklist

 View individual student requests/schedule

Column Headings – Click once to resort the screen by the selected column. Grab the right bar and drag to stretch a column wider for readability.

 Filter **View** menu - Each menu option (Student, Teacher, Room, etc.) allows filtering by specific fields in the file you are viewing. The view file will maintain the selected filtered records while scrolling forward  or backwards  through the file.



Click to start the process. Use the dropdown list to select a Field, select the Operator (equals, not equals, etc.)

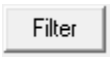


Select valid values for the selected field.

The Student view also allows you to filter by predefined student groups. Use the [Add Filter Term] button to select data fields within the Student view.



Remove existing filters and return to a full-file view.



Accesses the same Filter tool options as described above, but only to filter data within the search window (example: Grade = 02 shows only 2nd graders). Once a record is selected the view file does not maintain juniors if scrolling forward or backwards.

Elementary Scheduling Assumptions:

- Students are scheduled with a primary teacher using a single 'Homeroom'. The homeroom course is used for state reported self-contained classes for grades K-5, but may be used up to grade 8 for small schools.
- Students take classes based on subjects with no assigned schedule period. Course subjects (language arts, science, social studies, etc.) are usually linked to the 'Homeroom'.
- Most elementary classes last the entire year so there is only one scheduling term (YR). Some elective courses may rotate within the year (9, 12, or 18 weeks). Grading cycles are defined in the gradebook and can be different intervals (Quarter, Semester, or Trimester)
- Course subjects such as Physical Education, Music and Special Ed taught by specialized teachers, not the homeroom teacher, require state reporting NCES codes. They may or may not be linked to Homeroom.
- Gradebook attendance tabs are determined by the Teacher/Advisor assignment in WebSIS, not by the scheduled homeroom course.
- All elementary schools use custom report cards from Gradebook and most are standards based. Creating new courses implies standards need to be linked and the custom report card may need to be reviewed. Contact LBL ESD Gradebook experts for guidance.

Select a Student Scheduling Method

The Master Schedule contains all subjects taught by each teacher. A primary subject of Homeroom "links" together academic subjects. Student assigned the 'Homeroom' of a teacher will have all of the subjects associated with that teacher. We recommend that all elementary schools prepare their teacher master schedules before June 30th.

Once the teacher master schedule is complete, there are two methods of creating student schedules. The difference between the two student scheduling methods is really timing – spring or fall.

Scheduler Loader (spring)

The Scheduler Loader method is used in spring scheduling. Groups are created and assigned to the teacher Homeroom course, then the "Loader" creates the student schedules. Administrators must determine student assignments for the groups before June 30th. Both master and student schedules are simultaneously finalized in August.

- Recommended for schools needing 3rd Party vendor rosters in early August. Allows students to be scheduled in May/June, prior to summer break, and finalized when staff return in early August.

- Students are assigned one course request – Homeroom (usually grade level specific).
- A "group" of students is created for each homeroom teacher and then assigned to the teacher's homeroom course in the master schedule.
- Scheduler Loader is used to create the student schedules. The schedules can be finalized anytime in August for 3rd party vendor files, but not sent to gradebook.
- Schools notify LBL when they are ready for teachers to see gradebook rosters.

Teacher Class Rostering (fall)

Teacher Roster scheduling cannot be done until after the Master schedule is finalized in August or September. Students are then manually entered on each teachers Homeroom class Roster tab.

- Used by elementary schools who wait until August, or AFTER school starts, to schedule.
  - If your district requires student rosters for 3rd party vendors in August, you must complete the schedule process by your district due date.
- No course requests or student groups needed.
- The teacher Master schedule is created and finalized either before or after school starts. No student schedules are generated with the finalize process.
- Students are manually entered into their homeroom class using the 'Class Roster' tab in SILK Main (View Classes). The Homeroom class automatically schedules the student into the associated "linked" classes.
- Schools notify LBL when they are ready for teachers to see gradebook subject rosters.
- **IMPORTANT:** WebSIS Teacher/Advisors must be completed prior to the start of school for attendance in the gradebook. Attendance for state reporting (AM/PM) is not done on schedule subject tabs.

Basic Schedule Preparation

Contact the LBL Help Desk to request access to the Next Year Scheduling database. You will be notified when the SILK Scheduler icon is added to your access portal. All elementary schools need to complete the following items in preparation for next year scheduling.

WebSIS

- Review/update the Next Year School assignment for all grade levels
- Review the Staff Security Directory
  - ADD new staff who will be moving to your building from within the district. Do not create duplicates, pick up the existing person from the global staff directory.
  - Be sure to mark the SIS and GB checkboxes on the directory page, and assign the Role of Teacher in Security Information.

SILK Scheduler

Set SILK Calendar Properties

- Calendar menu > Set Scheduler Calendar > select next year – [OK]
- Calendar menu > Edit Calendar > [Properties]
  - General tab – verify/update Start Date
  - Terms tab – verify/update Start and End Date of term
- Close calendar, select [Yes] to save any changes that were made

Review School Level Courses offered

- View menu > Courses Offered >  > click [OK] to see ALL courses available to your school
- Need to add a course? Check with your District SIS Data Coordinator first. If your district uses a custom report card and standards grading all new courses must be pre-approved for gradebook setup.
- No longer offering a course? Select the course and "uncheck" the box labeled – Offered in Scheduler. If the course is being used for the current year schedule, then it should remain active and offered for scheduling. These courses can be "unchecked" in June.

8 ELEMENTARY SCHEDULING

Review Teachers

- View menu > Teachers >  > click [OK] to see ALL teachers available to your school.
- Teachers moving to your school from within your district must be adjusted in SILK Main – District level. If you do not have access to the district level in SILK, contact your District SIS Data Coordinator for teacher changes.
  - Add/update school information on the Teacher 'Schools' tab. Do not change the General tab – 'Home School' dropdown during the school year.
  - Teachers who are no longer active in a building (current year) may have the school removed from the 'Schools' tab. If they are no longer active in the district, change the General tab 'Status' to "inactive"
- New Teachers, to your district and school, need to be added to your WebSIS Staff Security table. They will be automatically pushed to SILK. The Home School will be identified as the first school identified in WebSIS. Additional buildings must be added in SILK Schools tab.
  - LBL recommends your district HR department, or District SIS Data Coordinator, adds new hires to WebSIS Staff Security. The HR department has all the legal information and SSN required for entry and can point the new hire to multiple buildings if necessary. Schools can then assign security Roles for their building.
- Verify your SILK school staff list contains a "placeholder" record named 'NEW Teacher' or 'TBD'. This record should NOT be in WebSIS, only SILK.

Review Schedule Options (for Scheduler Loader)

SILK Scheduler has Global Scheduler Settings (general defaults) that should be reviewed at least once at the start of scheduling. These settings are used by the Scheduler Loader process. This information is not used for Student Roster scheduling.

- Options menu > Scheduler Settings… only the General Control tab applies to elementary scheduling:
  - Default Class Sizes: used as the default class sizes when creating new class sections in the master schedule, each class size must have a value (Maximum, Optimum, Minimum)
  - Loader per student timelime (sec) tells the schedule loader how many seconds of scheduling time to spend on each student. Recommendation is 5 to 10 seconds.
  - All other options listed in the General Control tab should be unchecked or zero value.

Verify Students to be scheduled

Run a report in SILK to verify all students are showing in the correct grade level for your building. If students are missing, verify they are identified correctly in WebSIS Next Year environment as assigned to your building. If WebSIS is correct, contact the LBL Help Desk to redirect students in SILK.

- Reports menu > Scheduling Reports > Students to be Scheduled – sorts alphabetic by grade level

Open/Create the Master Schedule

The majority of elementary schools using 'Homeroom' scheduling have preset courses/standards used for custom report cards. LBL ESD will copy the prior year master schedule into the next year when we create the Next Year Scheduling database. If a new building is being established, you will need to create a master schedule from scratch. Please contact the LBL help desk for assistance.

Open existing Master Schedule

- File menu > Open > Click the Master Schedule in selection box and [OK]
- Maximize display window and adjust column widths by dragging header right or left to view full descriptions of Link, Course Name, and Teacher

Review/Update Teacher Assignments

- Click the Teacher Name column heading to sort teachers alphabetically.
- Remove teachers who will not be teaching next year, or who are changing subjects or grade levels.
    - Highlight all rows for the teacher, Right-click and select 'Remove Teacher'

TIP: If many of your teachers are changing grade level assignments, highlight the entire Master Schedule and remove all assigned teachers. This gives you a "fresh" list of linked courses that can be easily assigned teachers.

Review Courses and Adjust the Number of Sections

- Click the Course Name column heading to sort courses alphabetically. Review all the subjects for any changes.
- Remove courses that will not be offered – example: Art or Music.
    - Highlight all the rows and click the [Delete] button.
- Review and reduce the number of sections offered for each grade level. Example: If you had three grade 02 class this year, but will only have two next year, you need to 'Remove' one section of all the grade 02 subjects.

- Click the 'Link' column heading to sort by linked courses. In the Grade 02 example, there will be 3 "groups" of courses with linked numbers ending in dashed numbers (-1, -2, -3). It is recommended that you "remove" the highest link number (3), and keep the lower groups 1 and 2. Highlight every row with the matching section ID then click [Delete].

ADD Course Sections

Use this option to add special courses that are not linked to any homeroom (example: Band, SPED Skills, Title 1 Reading), or when additional Homeroom classes for specific grades are needed.

- Click the [Add] button, then click the dropdown list button. Search for the course to be added (3-4 letters), enter the number of sections to Add, and then click [OK].
  - For new homerooms, you must add EVERY course for the grade level to match all the existing linked grade level selections.

LINK Courses to Homeroom

- Highlight all the new courses you want to link together (link column will be blank), right click and select 'Link Sections…'
- Click [Add All Selected] button, checkmark the Homeroom course to identify it as the Primary Course, then click [OK].
  - Verify the Link number column has all the correct courses with the same Link ID#.

Schedule Students – Choose an Option

Scheduler Loader process (spring scheduling)

SILK Scheduler - complete the **Build Master Schedule** process above

Create Automatic Course Requests (ACR)

- Options menu > Automatic Course Request Rules 
- Complete an ACR rule for each Grade Level -
  - Rule Name = a specific Grade (Grade 01, Grade 02, etc.)
  - Student Filter = a filter by the associated grade level
  - Click [Edit Filter]
  - Click the [Add Filter Term]
  - Field = Grade
  - Value = single digit number, or use the [Select Value] button (KG = 0)

- Courses = Course number for Homeroom
- Click [Add] and select Homeroom from the course list

Use this same process to create ACRs for any special classes such as Orchestra, Band, Special Ed, etc.

Create Homeroom Groups

- View menu > Groups and click the  icon to create a New Record.
  - Enter a description of the group (example: Martin HR, 03-Harrison) and click the  icon to Save.
  - Select the 'Roster' tab to add students to each group
  - Select the 'Add student from this school' button on the right
  - Search by 'Grade' and enter the *current* grade level of students (example: next year's 1st grade is this year's KG)
  - Select/highlight all the students to complete the group and click [OK]
    - You can remove students by highlighting and clicking [Remove]

Assign Groups to Homeroom Courses

- Open Master Schedule (open file icon)
- Sort the list by clicking on the Course Name column Heading and scroll to the Homeroom courses
- Double-click on a Homeroom to access the 'Class Properties' window
- Click the dropdown in the 'Group' field and select the desired Group to assign to Homeroom/teacher section.

You can use the same process for creating homeroom groups to also create special student groups such as Band, Orchestra, or Special Ed. Remember to assign them to the appropriate course section in the Master Schedule before running the loader.

Run Automatic Course Requests

- Setup menu > Run Automatic Course Requests
- Verify that all ACR rules are checked, then click [Run]
- View a few students to see if the Homeroom request shows on their **Request** tab
  - Click the  button and the green arrows [>] to scroll through a few students

Run SILK loader to schedule students

- Load menu > Load Classes
- Click the [Begin Load] button

- View a few students to see if all linked subjects show on their **Schedule** tab
  - Click the S button and the green arrows [>] to scroll through a few students

Finalize Scheduling Process (August)

Follow the instructions below to **Finalize** the Master schedule in SILK Scheduler

- Do NOT use the scheduler icon after Master Schedule is finalized! All work continues in SILK Main.
- Schedules are "Live" and all additions and changes follow standard school-year processing steps found in the **Quick Reference Guide** section of this manual.

Class Roster Entry process (fall scheduling)

SILK Scheduler - complete the **Build Master Schedule** process above

Follow the instructions below to **Finalize** the Master schedule in SILK Scheduler

- Do NOT use the scheduler icon after Master Schedule is finalized! All work continues in SILK Main.

*Log in to **SILK Main** to assign students to Homeroom Class Rosters*

- Click View > **Classes**
- Click  and search for 'Homeroom' (use the first 3-4 letters/characters of your course description to view ALL homeroom classes)
- Highlight/select the grade/teacher to assign students
- Click on the **Roster** tab
- Click [Add] at the bottom of the Roster window
- Change 'search by' to **Grade** and enter the 2-digit grade level you wish to schedule (KG, 01, 02, etc.)
- Highlight the students to be assigned to the teacher
  - Hold the 'Ctrl' key while clicking names to highlight specific individuals
  - For ALL students in the grade, click the first student the hold the 'Shift' key and click the last student name to highlight everyone
- Click [OK], then enter the Enrollment Start Date for the class (only if entry is after school has started)
- Use the Roster assignment process for special classes that are not linked to Homeroom (Special Ed, Band, Orchestra)

Finalize Master Schedule in SILK Scheduler

We recommend you contact the LBL Help Desk for a final master schedule review before completing the Scheduler Finalize process. As part of the review process, we will collect your data integration timeline for WebSIS, Vendors, and Gradebook.

- This process cannot be complete until all district databases are rolled into the next year. LBL ESD completes this process in mid to late July.
- Verify Calendar and Term **Start** and **End** dates match:
  - SILK Calendar > General and Terms tab
  - WebSIS Profile > Terms tab
  - Gradebook > System > Manage Templates – run Template Verification Report
- Open the Master Schedule – Update name of Master Schedule
  - Right click any row in Master Schedule and select 'Properties…'
  - Change 'Master Schedule Name' to: YYYY-YY Master Schedule (example: 2020-21 Master Schedule) and click [OK]
- Click the red [Checkmark] button to access the Scheduling Status Checklist
  - Select each item in the 'To Do Next' box on the right – working from top to bottom of the list.
  - Click either [Skip] or [Mark complete] on all options except 'Finalize scheduling' to mark them on the list.
  - On 'Finalize scheduling' option, click [Execute], click [Finalize], then click [OK] to confirm scheduling is finalized for the calendar/year.

ALL work with students and teachers is now done in **SILK Main**. Do NOT use SILK Scheduler beyond this point.

If you did not complete the finalize process with an LBL representative, please notify LBL Help Desk that you finalized your master schedule so we can remove the Scheduler icon from your SILK portal and collect your file integration date timeline.

Send schedules to the Gradebook

District who finalize schedules in early August to facilitate Vendor uploads can continue to schedule new students and make adjustments to teacher schedules in SILK Main. You are in 'standard operation mode' for the school year, but you do not need to send schedules to the gradebook.

Prior to the beginning of school, a one-time preliminary gradebook load can be performed. No additional schedule changes will show for teachers until Day 1 –Start date of your school calendar. We recommend waiting until a few days before school

starts to send schedules and generate gradebooks so class lists will be as accurate as possible. Please contact the LBL Help Desk with the date you want schedules sent to the gradebook.

Quick Reference Guides

QRG Schedule a New Student

LBL Information Systems Program Quick Reference Guide

Schedule a New Student

As new students register/enroll during the school year, a schedule is required to connect them to classes in the gradebook. Once enrolled in WebSIS, the student should show in SILK Main within 3-5 minutes (you may need to "refresh" your screen if you already have SILK open). Assign the student to their classes using the process described below. The student will show in the gradebook tab for the teacher tomorrow. Basic scheduling rule – DROP classes today, ADD classes for tomorrow!

New Elementary student (subjects)

1. View > Students (or use the S button)
2. Click  to search for student by name
3. Click the **Schedule** tab
4. Click the **[Add]** button (lower left)
   A. Click the Select Class to add to this schedule [dropdown]
   B. Search by Course Name – HOMEROOM class
   C. Select the Homeroom/Grade/Teacher for the new student
   D. [Optional] Adjust DATE of enrollment
5. Click **[OK]** to save – all subjects for the student will show on the schedule tab
   A. If your school has special classes (leveled Math/Reading, Band, etc.) that are not linked, you will need to repeat the [Add] process for the extra course(s) needed.

QRG Change Student Schedule

LBL Information Systems Program Quick Reference Guide

Change an Elementary Student Schedule

Elementary Schedule change

Most elementary subjects are linked to the Homeroom class. If a student is moving from one homeroom teacher to another you will drop all classes, then add the new homeroom class to get all new subjects.

1. Log in to SILK Main
   A. Verify you are in your school environment
2. View > Students (or use  the button)
3. Click  to search for student by name
4. Click the **Schedule** tab
5. Click the **[Drop All]** button
   A. Last Day in class defaults to "today"
   B. Because there is no attendance associated with elementary courses, you may adjust this date to a prior date
6. Click [OK]
7. Click the **[Add]** button (lower left)
   A. Click the Select Class to add to this schedule [dropdown]
   B. Search by Course Name – **HOMEROOM** class
   C. Select the **Homeroom/Grade/Teacher** for the new student
   D. [Optional] Adjust DATE of enrollment
8. Click **[OK]** to save – all subjects for the student will show on the schedule tab
   i. If your school has special classes (leveled Math/Reading, Band, etc.) that are not linked, you will need to repeat the [Add] process for the extra course(s) needed.

QRG Schedule Roster Change

LBL Information Systems Program Quick Reference Guide

Elementary Homeroom Roster Change

For elementary schools, individual subject changes are not associated with a period. If you need to move a Homeroom class with linked subjects, it is best completed in a 2-step processes: (1) drop all students in the Homeroom Roster tab, then (2) [Add] students to the new Homeroom Roster tab.

1. Log in to SILK Main
   A. Verify you are in your school environment
2. View > Classes
3. Click  to search by either Course or Teacher
   A. Click to select the Homeroom class to be moved
4. Click on the 'Roster' tab under the blue banner
5. Highlight all the students to be moved
   A. To select ALL, click the first student, hold the [Shift] key, click the last student
   B. Deselect previously dropped students by holding the [Ctrl] key and clicking on the dropped student's name
6. Click the **[Drop]** button
   A. Date defaults to today, adjust if necessary
7. Click **[OK]** to save
   A. Current class Roster will show a Drop date for all the students
   B. All subjects that are "linked" (see General tab) will be dropped with this same date
8. Click  to search by either Course or Teacher
   A. Click to select the NEW Homeroom class to receive the class roster of students
9. Click on the 'Roster' tab under the blue banner
10. Click the **[Add]** button
11. Search by 'Grade' and enter the 2-digit grade level of students (i.e. KG, 03)
12. Click **[OK]** to view an alphabetic list of students in that grade
13. Highlight all the students to be moved
    A. To select ALL, click the first student, hold the [Shift] key, click the last student
    B. OR - hold the **[Ctrl]** key and click on individual student names to highlight all the students you wish to add into the new homeroom class
14. Click **[OK]** to save selected students

QRG Change Student Schedule

LBL Information Systems Program Quick Reference Guide

Elementary Homeroom Roster change (continued)

15. Change 'Date' to the date students start in the new homeroom
    A. This date needs to be after the drop date, they cannot be the same date
16. Click **[OK]** to save
    A. New students will show in the new Homeroom and all "linked" subjects
    B. View a student