

Initial Pre-Scheduler Configuration

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As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

Overview

The Veracross Scheduler is a separate module that is used to help schools build their schedules for the upcoming school year. In order for schools who have purchased the Scheduler to begin their scheduling process, some initial configuration must be done before logging in and using the Scheduler. If you are interested in purchasing the Veracross Scheduler, talk with your account manager.

Getting Started

Before you can begin to use the Veracross Scheduler, some configuration needs to be done to determine what information the Scheduler will reference. You can use the following as a checklist to make sure each piece is configured properly prior to any activity within the Scheduler. In conjunction with this documentation, please use the integrity check and configuration queries found on the Scheduler Prep homepage in Axiom.

As you go through each step below, please begin to take note of questions you might have regarding your specific scheduling process in relation to the Veracross Scheduler.

Review Scheduler School Year

Is your school scheduling for this year or next year? Depending on the answer to that question, update the "Scheduler School Year" parameter. That will dictate what course requests can be seen in the portal as well as preparing the scheduler to be used.

Course Requests

ALL course requests must be added before using the Scheduler, including requests for newly accepted students. New student course requests need to be entered in Axiom by an administrative staff person. Future Students and Accepted Applicants are not able to use the portal to request classes, and

Teachers are not able to access future student or Accepted Applicants records from within the Teacher Portal. The only way to input requests for new students is in Axiom.

It will also be possible to add Course Requests from within the Scheduling module for Accepted Applicants as well as Current and Future Students. However, Accepted Applicants must have at least one course request entered before they will appear in the Scheduler. ALL course requests must be entered before running the Scheduler.

***Important Note:** Course requests MUST be tagged to the upcoming school year only. Course requests that are tagged to the current or a prior school year will not be included in the Scheduler.

School Level Configuration

1. **Include in Scheduler** – Each school level that is using the Veracross Scheduler must have its own configuration for what to include in the Scheduler. To configure each school level, you'll need to use the "Scheduler Configuration" queries under the school level column on the Scheduler homepage. From these links you can configure which Courses, Blocks and Rooms should be included in the Scheduler. This allows you to control what data (within Courses, Blocks and Rooms) the Scheduler will or will not use. Veracross analyzes your school's current schedule configuration and tries to pre-set these Course, Blocks and Rooms according to how your schedule is currently setup in Veracross.
2. **Scenario to Keep** - Click into the Scheduler Configuration query on the Scheduler Prep homepage. Click into the configuration record and use the Scenario to Keep drop-down menu to select the scenario you would like to keep from the previous year – typically, this is the scenario that you think will get you the best results this year. After you select the Scenario to keep and click Update, run the Reset Scheduler for New School Year procedure in the Action menu.
This process must be done for each scheduler configuration.

Courses

1. **Scheduled Courses** – Configure which courses should be included in the Scheduler (i.e. which courses should have classes that are scheduled by the Scheduler) from the "Courses" query under Scheduler Configuration on the Scheduler homepage. Examples of courses to exclude might be independent studies, TA courses, etc. These will NOT appear in the scheduler, even as an option to manually schedule if "Include in Scheduler" is not checked off. **Note:** Schools who want to manually schedule TA hours or Study Halls for students after the Scheduler has enrolled students may want to allow these courses to be included in the Scheduler, but leave these courses setup with no classes. This would allow a school to manually add classes and enroll students in those classes after the rest of the scheduling was complete.
2. **New Courses** – In addition to configuring which Courses should be included in the Scheduler, any new courses that should be included must be set up and configured ahead of time in Axiom. You

cannot add courses from within the Scheduler.

3. **Course Subject** – Make sure any course that applies to more than one division is set up as its own course within the subject for EACH division that it applies to.

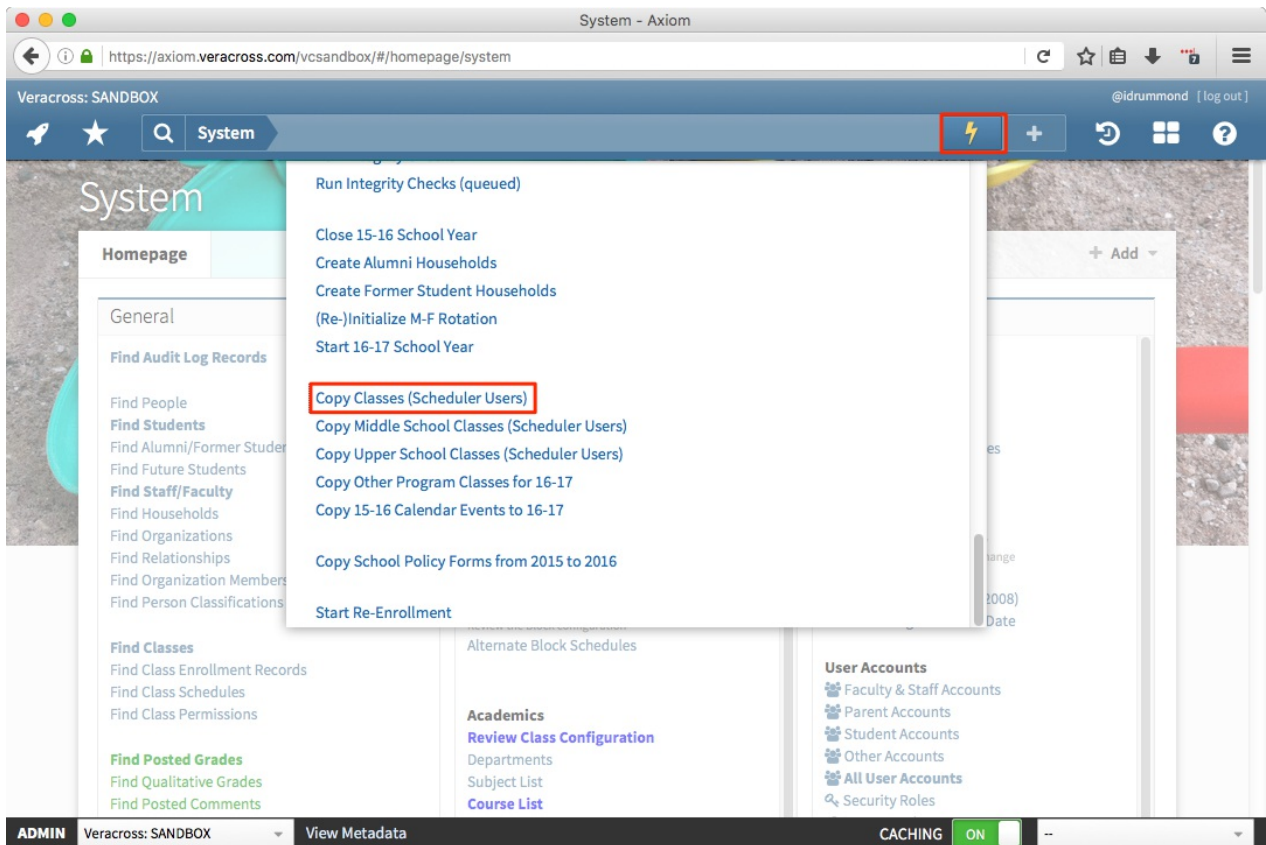
Blocks

1. **Scheduled Blocks** – Set which blocks the Scheduler should actively try to schedule classes in. Universal periods should not be included in the Scheduler (things like lunch, chapel, advisory, etc.). Only periods that require a student to be accounted for in a specific class should be included in the Scheduler. Universal and Obsolete Blocks will be set by default to not be included in the Scheduler.

Rooms

1. **Scheduled Rooms** – Indicate which rooms are available to schedule classes in using the Rooms query. For example, if the cafeteria or auditorium should not have any classes scheduled there, uncheck those rooms from being included in the Scheduler on the Rooms query.
2. **Add Rooms that are missing** – Make sure every room that can have a class scheduled in it is entered as a resource in Veracross and is set to be included in the Scheduler.
3. **Room Capacity** – In addition to indicating which rooms should be used in the Scheduler, set a max room capacity on every room. A room with no capacity indicated is interpreted as having infinite capacity.
4. **Subject/Room Pairing** – If a room should ‘belong’ to a certain subject by default (e.g. Chem Lab belongs primarily to Science, or the Gymnasium belongs primarily to Phys. Ed.), indicate the primary subject/room pairing here by setting the primary subject that should be scheduled in the room. Other subjects can be configured to also use these rooms from within the Scheduler. Subject/Room pairing can also be overwritten on a course specific basis if needed.
5. **School Level** – If a room should have a school level associated with it, mark it on the detail screen of the room. By default, Rooms that have school level “All School” or that match the school level of the division that is using the Scheduler will appear in the Scheduler.

Classes



1. **Copy Classes** – The Scheduler must have class records for next year already created in Veracross to be able to schedule them. You can add classes for next year by either copying the current year classes, or manually add classes by hand for the next school year. If your school is scheduling both Middle and Upper School, you must copy classes or manually add them for both divisions. [Learn more about copying classes.](#)

***Note:** Scheduler users should use the “Copy Classes (scheduler users)” option from the the Action menu on the System homepage. If this is not available, check with your Account Manager.

2. **Primary Teacher** – Classes MUST have a Primary Teacher set to teach the class, or the class will not be scheduled. Note that only Primary Teachers will appear in the Scheduler; Additional Teachers on a class will not.

3. **Grading Periods** – Each class for the upcoming school year must have grading periods checked off on the “Scheduler Grading Periods” tab that indicates when the class can be scheduled to meet (this can also be configured again within the scheduler module). You’ll need to close and re-open the class screen if you just added a new class in order to see the Scheduler Grading Periods tab in Axiom. **Note about mid-period class configuration:** – Currently, the Scheduler does not schedule mid-period classes. There are slight workarounds to this; however, mid-period classes will need to be scheduled manually to some extent. If a class meets during a mid period (e.g. less than the duration of a minor grading period), the class must have the minor grading period it meets during checked off. The Scheduler will schedule the class for the minor grading period as long as a grading period is checked off on the “Scheduler Grading Periods” tab. However, the class schedule will need to be modified in Axiom after the class is scheduled, using the Start and

End dates of the class to properly configure when the class should meet.

4. **New Classes/Sections** – Add any classes for new courses and/or new sections for existing courses that should be scheduled for next year. You will be able to also add new sections within the scheduler if needed.
5. **Max Students** – Set a max number of students on the Other tab of each class so the Scheduler will not enroll too many students in a section. A class that has no max students indicated will not have any limit as to how many students can be enrolled in that particular section (up to the limit specified on the Room, if applicable).

Subjects

1. **Divisions** – Each subject must be associated with either Upper School or Middle School. If the school level is set to ALL, the Subject and its Courses will not be included in the Scheduler for either division.

Course Classifications

Each school can customize the list of available course classifications to best fit how they categorize their list of courses. The course classifications will need to be added prior to using the Scheduler Builder. [Learn how to add and manage course classifications.](#)

Please go through each configuration step above using the tools on the Scheduler homepage within Axiom prior to when you need to begin scheduling.

Please contact your account manager to notify them of the date you wish to start scheduling. You can then setup a date and time for training to first log in to the Scheduler.
