

# ***TT - Options***

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## **for Windows™**

***A computer program by  
Chris Johnson & Keith Johnson  
to arrange your Options for you !***

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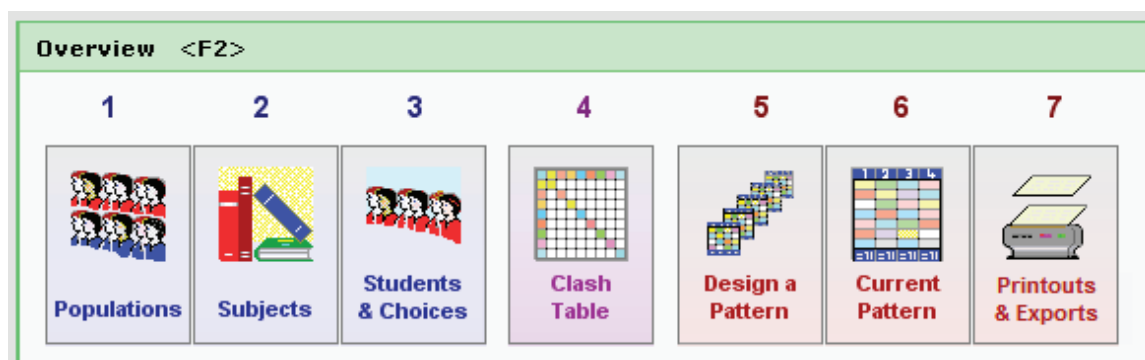
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Published by :  
October ReSolutions Limited, Lymm, Cheshire, UK  
[www.timetabler.com](http://www.timetabler.com)

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## Some unsolicited comments about the **TimeTabler** programs:

*"A very powerful and useful set of programs" - Timetabler in Lancashire*

*"Options is just excellent . . . it did all I asked . . . in an easy and friendly way" - Wales*

*" . . . maintains the high standards you have set in terms of software that really does the job that schools want and need" - Cheshire*

*"I have just completed the transfer of the finished timetable from **TimeTabler** directly into SIMS .net. Your documentation was clear and logical, and I had no problems completing the transfer." - Yorkshire*

*" . . . your excellent timetabling programs" - Northern Ireland*

*" **TimeTabler** halved the time to prepare our timetable" - London*

*" . . . . great respect for a marvellous piece of programming" - Scotland*

*"Options continues to provide a real solution to an annual issue. We are delighted with the flexibility and adaptability of the software." - London*

*"Thanks for all your help . . . . a superb suite of programs" - Wales*

*"Many thanks for your help . . . The email support you have offered has been great " - Australia*

*"Congratulations on a great piece of software . . . keep up the innovations " - Malaysia*

*"Options is as terrific as **TimeTabler** . . . it is user-friendly, fast and efficient. It saved me hours." - Lancs*

*"Like your book on Timetabling, we have found it invaluable in our school" - Eire*

*"I am really pleased with the **Options** package, it has saved me hours of work." - Middlesex "*

*"The **TimeTabler** program is the easiest and most versatile I have used and I have tried most of them. For the timetabler it is a dream; easy to understand and works exactly to timetabling best practice. Set it up and it will deliver a real quality timetable." - Lancashire*

*" . . . a delight to work with . . . I am extremely grateful to you for producing it" - Staffordshire*

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- Somerset*

*"I am very impressed . . . **StaffCover** is of the same excellent quality as **TimeTabler**" - Wales*

*" Our existing columns only gave them 50% pupil satisfaction, whilst with **Options** I was very quickly able to improve that to only 1 pupil not getting exactly what he wanted." - Oxfordshire*

*"Many thanks . . . . we are delighted . . . . you are saving us hours" - Shropshire*

*"I found **TimeTabler** much easier to use than the one offered by my school system." - Surrey*

*"Options. Superb!! What a time-saver!!" - Scotland*

*"Many thanks for an excellent package" - Scotland*

*"**Brilliant program ! Its power far exceeds any other timetabling software I've tried**" - Wales*

*" . . . a godsend . . . your program is far better than others costing considerably more" - Australia*

Many more comments and testimonials at: <https://www.timetabler.com/comments>

## Introduction

Arranging the optional part of the school or college curriculum into a suitable pattern can be a challenge.

Often this is the most complex part of your curriculum, requiring a careful balance so as to offer a wide choice without using too many expensive staffing resources.

The ideal curriculum will offer the students all the choices they wish for, and achieving this can be a valuable motivator, perhaps leading to a better ethos and better examination results.

It can also be important for public relations with the parents.

At the same time the cost of staffing extra groups is very high, and it is important to find an efficient pattern of subjects that can be staffed within budget.

Using a paper system to find the best arrangement can be a daunting task.

**Options** can quickly cut down the laborious aspects, while still allowing you to use your skill and judgement in knowing what is best for the students, and the school.

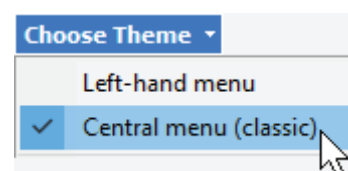
This is the value of **Options**. We hope you enjoy using it.

Chris Johnson

Keith Johnson

### Note 1:

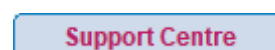
This Handbook shows the program set up for pictorial icons. But you can choose an alternative Theme of (alphabetical) icons via the button at the bottom of the screen. More in Appendix 16.



### Note 2:

You will find many articles about **Options** in the KnowledgeBase in the Support Centre, including the useful White Paper at:

<https://www.timetabler.com/PDFs/WhitePaper-on-Options-&-TOOLS.pdf>



# An Outline of *Options*

This **Options** program helps you to deal quickly and effectively with a common situation in schools & colleges, when students are given some Choice in the subjects they wish to study.

In UK schools and colleges it occurs typically:

- at the end of Year 9 (Grade 9, S2) when students are asked to choose which subjects they wish to study in Year 10 (eg. for GCSE, BTEC, 14-19 Diplomas or National exams),
- at the end of Year 11 (Grade 11, S4) when students are asked to choose which subjects they wish to study in Year 12 (the 'Sixth Form') (eg. for AS, A-level, IB, Highers).

Typically, students are given a list of possible subjects, and asked to choose a specific number of subjects (*for example*, four, perhaps with a extra 'reserve' choice).

Often there will be rules attached: eg. "*You must study at least one science*".

The students/parents can indicate their Choices on paper, or they can enter them on the internet from home, using the TOOLS system.

The intention is then to arrange the subjects in an appropriate pattern so that it can be scheduled as a timetable that will suit this particular group of students and their choices.

When all the Choices are collected in from the students, it is then the task, usually of a Senior Member of Staff, to organise the subjects or 'electives' into Option 'Blocks'. These 'Blocks' are also called 'Pools' or 'Columns' or 'Lines', or given names like 'Option B'.

Each Block is a set of subjects which are to be scheduled at the same time on the timetable. This means a student can normally study only one subject in each Block. In some year-groups (eg. Year 12) some students may study subjects in only some of the Blocks, being 'free' or having 'private study periods' at other times.

It is important to organise this arrangement as efficiently as possible..

## **The aims are:**

- To achieve the maximum 'Satisfaction Rate' for the students.  
ie. with the maximum number of students getting their chosen subjects.  
This is important for students and parents, and can affect the ethos of the school or college.
- To use the minimum number of groups consistent with good teaching practice.  
ie. to keep the cost of staffing the curriculum as low as possible.  
This can make a big difference to the school budget.

This is where the power of the **Options** program shows itself.

**Options** helps you to deal speedily and efficiently with the Students' Choices in order to develop the best Option Block Pattern to suit these particular students and your staffing.

The Tutorial (page 12) shows you how.

**Options** will run on any PC computer running Windows XP, Vista, 7, 8, 10, or later.  
(It can be run on a Mac using 'Parallels', 'Fusion', or similar software.)

## The main actions in using *Options*:

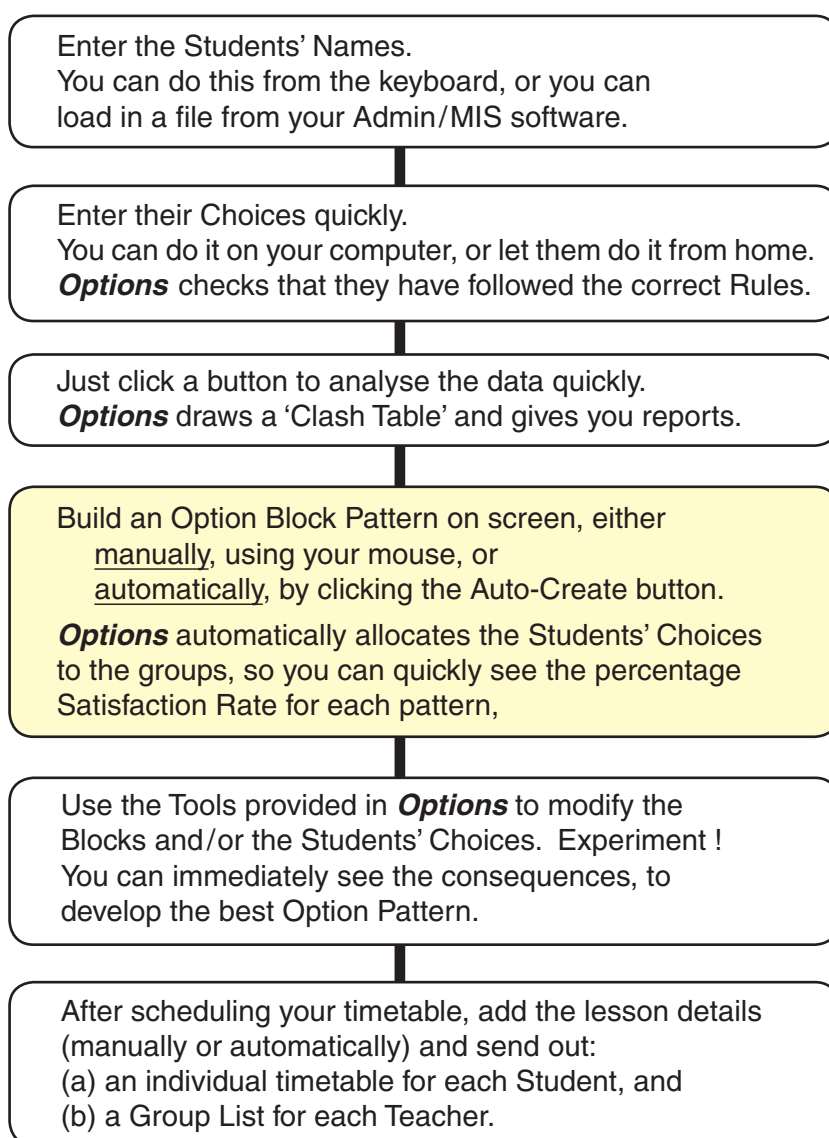
To achieve the best pattern of subjects, *Options* is very carefully designed so that you can:

- enter the Students' Names (either from the keyboard, or as a file from an Admin/MIS program that already contains their names),
- enter their Choices quickly (or accept them directly from home, over the internet with TOOLS),
- analyse the data quickly and effectively (eg. to see how many groups are needed for each subject; or to see which subjects can co-exist without disadvantaging any students; etc.)
- experiment by building Option Block Patterns, either manually or automatically, and automatically allocating the Students' Choices to them, so as to quickly see the percentage Satisfaction Rate for each pattern,
- use a variety of tools to modify the Blocks and/or the Students' Choices and immediately see the consequences, to develop the best Option Pattern for your school,
- when a suitable pattern has been devised, *Options* can print out for you
  - (a) an individual timetable for each student, and
  - (b) a group-list for each teacher.

These sheets can include timetable details from *TimeTabler*, so that Students & Staff know exactly when to go to each subject lesson. And you can 'mail-merge' a letter to parents.

These steps are shown on the Flowchart below.

The Tutorial demonstrates all these steps, and allows you to experiment for yourself.



# Installing *Options* on a PC

## Choosing a computer

*Options* will run on any standard PC with Windows XP, Vista, 7, 8, 10, 11 or later.

It is an advantage to obtain the fastest computer you can. A colour printer is useful.

Although many people run *Options* on a laptop screen, we think a full-size screen is an advantage.

To see the *Options* screens at their best you should set your display to:

- 1024 x 768 resolution,
- 'small fonts (96dpi)',
- 'high colour (16 bit)' or higher.

You can check or set these by following the route: Start->Settings->Control Panel->Display->Settings.

## To install *Options*

1. If you have been sent it as a download, just run (double-click) the file called **Setup.EXE**.

(Alternatively you can choose Start ► Settings ► Control Panel ► Add/Remove Programs ► Install)

*Alternatively*, if you have received *Options* on a CD, place the CD in the tray of your CD drive.

After a few seconds it will display a Menu from which you can select the program you want.

2. Then follow the instructions that appear.

At most steps you can just click on 'Next' (or you can cancel the installation).

At one stage it will ask you for the 'Destination Directory' where *Options* is to be installed.

The default that is supplied is C:\OPTwin

but you can change this if you like (click on 'Browse' to choose another directory).

If you name a directory which doesn't exist, *Options* will make it for you.

If you are also installing the **TOOLS** on-line system, see the separate documentation on this.

You may find it easier to go for the free Hosting of TOOLS option.

If you have any difficulties in installing *Options* on your machine, please do not hesitate to contact the HelpLine.

To install *Options* again or on another machine (eg. at home) repeat the same sequence. Please note that full copyright restrictions apply to *Options*. Any breach of copyright will be prosecuted.

*Options* includes routines that allow you to transfer your data between a machine at home and a machine at school, using just a USB memorystick etc (see page 10).

## To uninstall *Options*:

Follow the route: Start ► Settings ► Control Panel ► Add/Remove Programs.

In the lower box, find and click on *Options*, and then click on Add/Remove.

## To run *Options*:

You can start *Options* in two ways:

*Either:* Double-click on the red **OPT** icon on your desktop,

*Or:* Click on **Start**, then **Programs**, then find and click on **TT-Options** in the list of programs.

If you have the full version of *Options*, make sure that you use: > **Check for Updates** regularly.



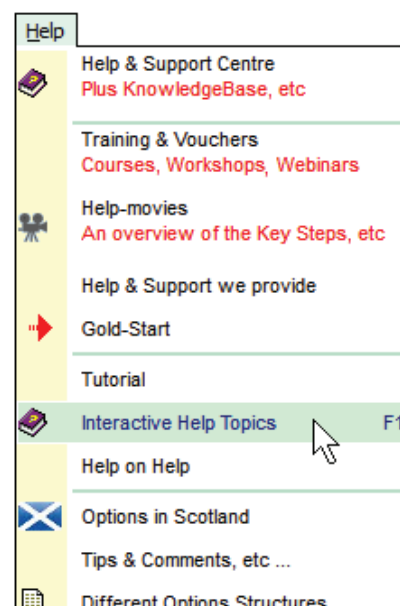
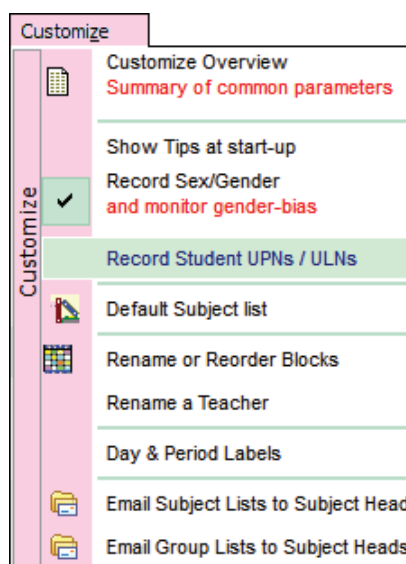
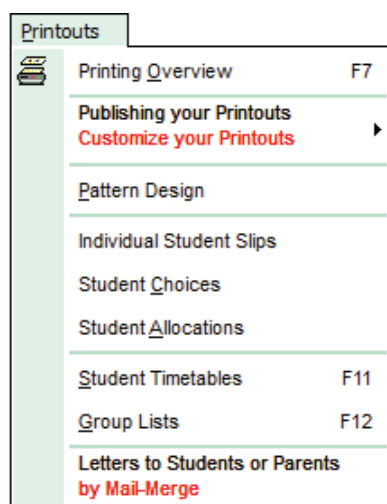
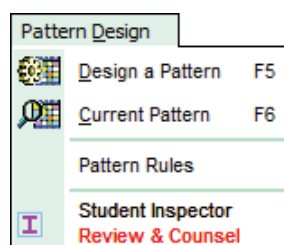
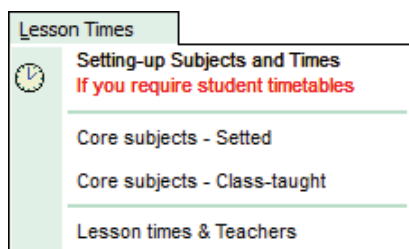
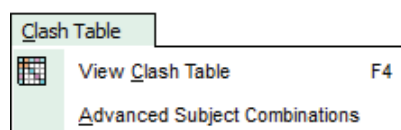
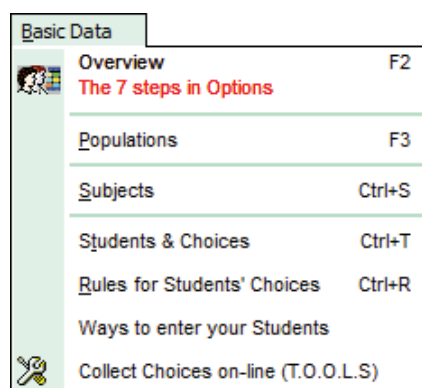
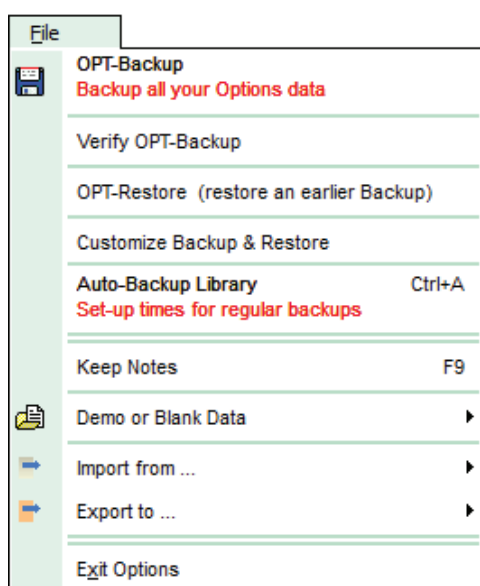
# The *Options* Menu

When you run the program you see the **Options** 'desktop' with the Main Menu titles on the menu bar at the top:




As you click on each word with your mouse you get a drop-down menu.

These menus are shown here for your information, and they are explored during the Tutorial.



## Saving your data on a 'memorystick' or other media

It is important to get into the habit of making a Backup at regular and frequent intervals, as


- an external 'backup' on a USB FlashDrive 'memorystick' or another medium, see below,
- an internal backup in the AutoBackup Library, at FileMenu  **AutoBackup Library**,  
[By default the autobackup reminder period is 1 hour, but you can change this if you wish.]


### File **OPT-Backup** (copy to a USB 'memorystick' or other media)

**Backup**


This allows you to save your options data on one or more USB flashdrives or Dropbox, etc,

- for **safety**, in case your machine breaks down, and also
- to **transfer** options-data from one machine to another (eg. to a machine at home), or
- to **archive** data for re-use later.

1. At FileMenu  Customize Back & Restore, browse to find the location of your memorystick or Cloud Backup (Dropbox, OneDrive, Google Drive, etc.). For example:

Path to backup files, eg: F:\TTDATA\  
 F:   
Show networks ☐

or

Path to backup files, eg: F:\TTDATA\  
 C:\Users\Keith\Dropbox  
Show networks ☐

2. Click on **Backup** then **Backup now** to make a backup copy of your options files.  
(Your Backup media now has a file called `Op2data.bak` with the current date & time.)
3. If you want to be certain that it has worked, check it by clicking on 'Verify' on the File Menu.

**We recommend that you use this method to make a safety back-up frequently, and particularly at each major stage, preferably a different Backup device/location each time.**

Note 1 : USB 'memorysticks' can easily be lost!

Note 2 : A new Backup overwrites (destroys) an old one in the same location.

Note 3 : To use Dropbox (or a similar 'Cloud Drive') you must install the app on your machine(s) first.

### File **OPT-Restore** (load from a 'memorystick', Dropbox, or other backup media)

This is the reverse of OPT-Backup, and loads the data back on to your hard-disc.

This sets **Options** back to exactly the position you were in when you recorded the Backup.

ie. if you used OPT-Backup at 3.14pm last Monday, OPT-Restore takes you back to that moment.

Note: obviously this method erases the **Options** data-files that were previously on your hard-disc.  
Make a Backup **first**, using OPT-Backup, saving to a *different* folder, if you want to preserve them!


1. Choose **OPT-Restore** on the File menu to load the data from the backup device.

Change the Location ...  
**Cloud** **USB** **Other**

Used in conjunction with OPT-Backup, this also allows you to transfer data between two computers running **Options** (eg. at home and at school), using just a USB memorystick, etc. See the HelpMovie.

**Options** is fully supported by expert HelpLine Support and Advice, both during the Tutorial and at any subsequent stage of using the program in your school.

For full details see: <https://www.timetabler.com/SupportCentre/Help-and-Support-Booklet.pdf>

Click on  (while you are connected to the internet) to get direct access to the **24/7 Help & Support Centre**.

It includes an extensive **Knowledge Base** with Answers to all the typical questions you may have. You can Browse the Knowledge Base or **enter key words in the Search box**.

You can download articles and 'white papers' on aspects of timetabling.

For specific questions that are not answered by the KnowledgeBase, you can submit a 'Ticket' to our expert staff for a detailed answer.

To get more details, click on the label that says: 

New Users are given extra support, as needed, by the **Gold-Start** Enhanced Support programme. More details at [www.timetabler.com/gold-start](http://www.timetabler.com/gold-start)

KnowledgeBase articles & email replies to Tickets are provided by Chris Johnson, Keith Johnson, Chris Knights-Branch and other expert Timetabling Associates.

Chris, Keith and Chris have over 80 years of timetabling experience between them, and have run many courses.

Keith wrote the standard book on UK school timetabling, '**The Timetabler's CookBook**'.

**Web-site:** [www.timetabler.com](http://www.timetabler.com) or [www.timetabler.co.uk](http://www.timetabler.co.uk)

In addition to the Help & Support Centre, there is also general timetabling advice on the web-site, particularly for people who are new to timetabling.

The web-site includes:

- free INSET training packs on timetabling in general, (the Combing Chart, Conflict Matrix, etc),
- free downloads of the Tutorial Packs for **TimeTabler** and **StaffCover**.

**Please ensure you register** your e-mail address with us to receive news of Upgrades & new features. (The web-site also includes free Physics materials and details of the readability of school science text-books.)




## HelpMovies

There are HelpMovies for you to view and so learn about the software.

[View Help-Movies](#) 

## HelpScreens

Throughout the **Options** program there are interactive HelpScreens:

- On any screen in the program, click on the **Help** button.  You will see another picture of the same screen.  
*On this image, click with your mouse* on any button or part of the screen.  
An explanation of that item is then shown to you.
- Choose Help on the Main Menu bar, and then choose **Help Topics**.  
Then double-click on any of the Book or Page symbols to read details about **Options**.
- While on any Help screen, you can click on the   buttons to see the previous or next page.  
You can do this repeatedly to read the entire Help documentation.
- Click on the **I**ndex button to search for information.

## Preparing for the Tutorial

Please check these 2 things before you start the active part of the Tutorial.

**First**, make sure you have only the Demo-Data installed.

If you have just installed **Options**, this will happen automatically.

The Demo-Data consists of some sample data (see below) to enable you to try **Options** and develop an Option Pattern, within a few minutes.

If the Demo-Data is not installed, but you want to go through the Tutorial, then go to File ►► Demo data to re-install the data. Ensure: Choose Theme ►► Central menu (classic).

Similarly, if you change any of the Demo-Data so that it no longer fits the steps of the Tutorial, you can re-set the data by choosing File ►► Demodata (on the File Menu).

**Second**, please note that on the first run through the Tutorial it is important to do only what is described at each key step. ***Please try to keep carefully to this.***

This is to ensure that you follow exactly the same path, so that what you see on your main screen will be the same as shown in the illustrations on the HelpScreen.

Later you can choose your own route through the program as you wish.

## Demo-Data

The Demo-Data is for a 7-form-entry school, about 200 students per year-group, divided into 2 half-year-groups in Year 10 (ie. Grade 10, aged 15 years).

14 'optional' subjects are offered to each half-year-group in Year 10.

The Year 9 students were asked to choose **4** of these subjects in the 'optional' part of the curriculum (as well as studying compulsory or 'core' subjects such as Maths, English, Science, PSE, etc.). (In this example they were not asked to choose a Reserve subject.)

So the Option Block Pattern for Year 10 has **4** Blocks in it (in this Tutorial example).

The Demo-Data has been entered for 101 students in Classes 9C, 9L, 9J, 9K.

The rules were that they had to choose:

- one modern language (from French, Spanish, German),
- one technology subject (from Materials Technology, IT, Food Technology, Graphics),
- and two more subjects from the list.

# Options Demonstration & Tutorial



To begin the Tutorial, run the program as described on page 8.  
You should now see the Main screen with the **Main Menu** bar at the very top:



## Screen 1

During this Tutorial we will look at some of these in detail.

If you click on any of these words on the Main Menu bar, a 'drop-down' list of items is shown.

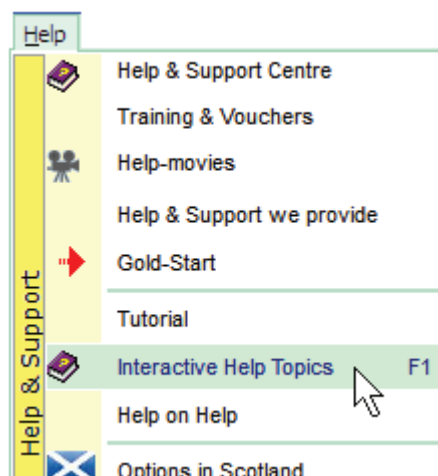


Click on **Help** on the Menu bar at the top of the screen.  
The Help Menu appears, as shown here:



From this list choose **Help Topics**, by moving your mouse down until 'Interactive Help Topics' is highlighted, and then clicking on it. (Or you can press the F1 key.)

The Contents list for Options Help appears, as shown below.



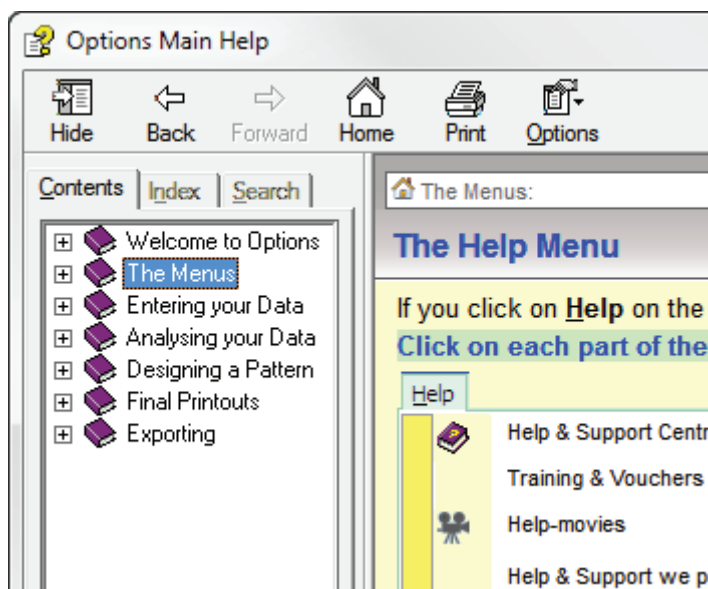
On this Contents List, click to open the book symbol called **The Menu**.  
Then click and Display the page called **The Help Menu**.

You will see an *image* looking like the Help Menu, as shown here.



Follow the screen instructions to click on each part of the image, to see what each part does.

Friendly interactive HelpScreens like this are available from every screen throughout **Options**, to guide you at each step.



To leave the HelpScreen just click on the program screen, and return to the program.



Click on **File** on the top Menu bar, then select and click on **Exit Options**.  
Or click on **> Exit Options** on the main screen. Then click on **Yes**.

These are the only correct ways to exit **Options**.

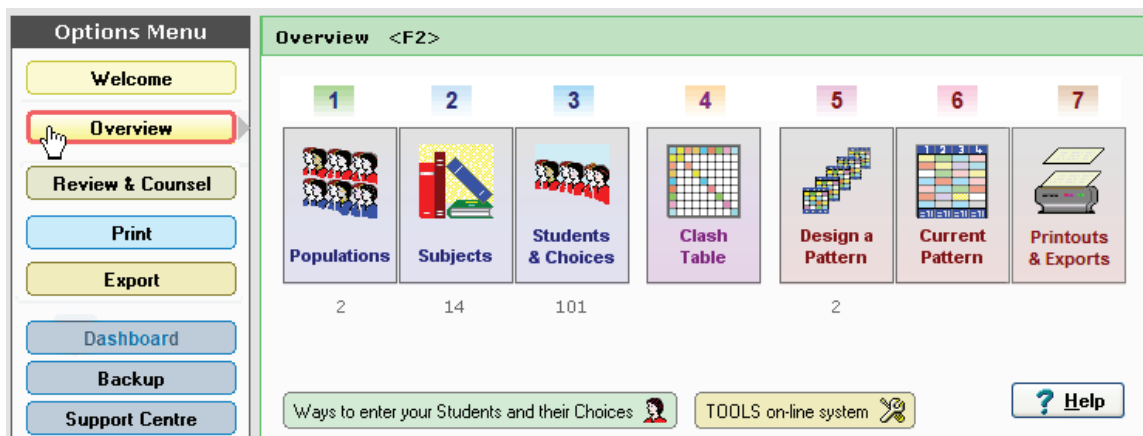
Then run the program again (as described on page 8) to re-enter it.

You can do this as often as you like.

# Overview Screen <F2>

7   
Action!

Click on the Overview button, so that the **Overview Screen** is shown:



This screen (at the right-hand side) shows you the 7 main steps in using **Options**. It is designed to take you step by step through the process, working from left to right. The 7 steps are described in outline on these 2 pages, and then in more detail later.



## 1 Populations

A Population is a number of students, to whom the same Choices are being offered. You give each Population a name, as explained later.

eg. "Year 10 in 2001" or "Next year's Lower Sixth" or "Next year's Y10-Top-Band".

You can specify up to ten Populations at a time, each of up to 2000 students.

Each Population can contain one or more 'Classes' (or 'Forms', or 'Registration Groups') eg. a Population called "Next year's Year 10" could consist of classes/forms 9A, 9B, 9Evans. (These Class Names can easily be renamed for the new school year - for example these three Classes could become 10X, 10Y, 10Z).



## 2 Subjects

These are the Subjects that are to be offered to this Population of students. ie. each Population has its own list of Subjects.

There is a basic 'default' list of Subjects supplied by the program. You can simply Edit the list so that it becomes your own list of Subjects for this Population.



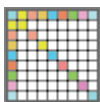
## 3 Students & Choices

You need to tell the program which Subjects each Student has chosen. There are 2 stages here:

1. The Names of the Students can be entered:
  - either from the keyboard, or
  - as a file from another program (eg an Admin System such as iSAMS or SIMS) which already knows the names of the Students. This is the usual way.
2. The Subject Choices of each Student are entered (or loaded with the file above).
  - either using the on-line **TOOLS**, so the students/parents use the internet at home, or
  - manually, using the keyboard or your mouse.

The Tutorial shows you how to do this.





## 4 Clash Table

The Clash Table is a large coloured Grid, plotting each Subject against every other Subject. This Grid shows you at a glance 2 main things :

### A. For each Subject:

- How many Students have chosen that Subject, *eg. 36 have chosen Art.*
- The Names of these students.

From this information **Options** shows you how many teaching groups are needed for each subject. *eg. two groups for Art (in the example above)*

This helps you to calculate the cost of providing this curriculum.

### B. For each Pair of Subjects:

- How many Students have chosen this pair of subjects.  
*eg. 22 have chosen both French & Geography.*  
*eg. none has chosen Spanish & German.*
- The Names of these students.  
*eg. only one person has chosen Art & Graphics (Kate Hollister).*

This information can help you to decide the structure of the Blocks in your **Options** Pattern.  
*eg. French & Geography should be in different Blocks (in the example above).*

*eg. Spanish & German can go in the same Block without disadvantaging anyone.*

*eg. If I want to put Art & Graphics in the same Block then I will have to counsel Kate.*



## 5 Designing a Pattern of Option Blocks

From this screen you can quickly design a set (or 'Pattern') of Option Blocks. (These Blocks are sometimes called 'Pools' or 'Columns' or 'Lines').

The Blocks can be designed:

- **manually**, by clicking with your mouse, or
- **automatically**, by using **Auto>Create**.

This Tutorial shows you how to design the Blocks.



## 6 Assigning students to the Current Pattern

At the push of a button, **Options** will quickly:

- assign your Students to the Option Block Pattern that you have devised,
- tell you how successful it is (by showing a % Satisfaction),
- show you how big each Subject Group would be if you kept this Pattern,
- show you which Students are in each group,
- show you which Students will be disappointed if this Pattern is used,
- etc, etc.

Several **Tools** and **Reports** are provided for you to manipulate and fine-tune the Pattern.



## 7 Printouts, and Export to an MIS


When you have finalised a chosen pattern, you can then Print out (or email) the details of:  
(a) an individual slip for each student, and  
(b) a group-list for each teacher.

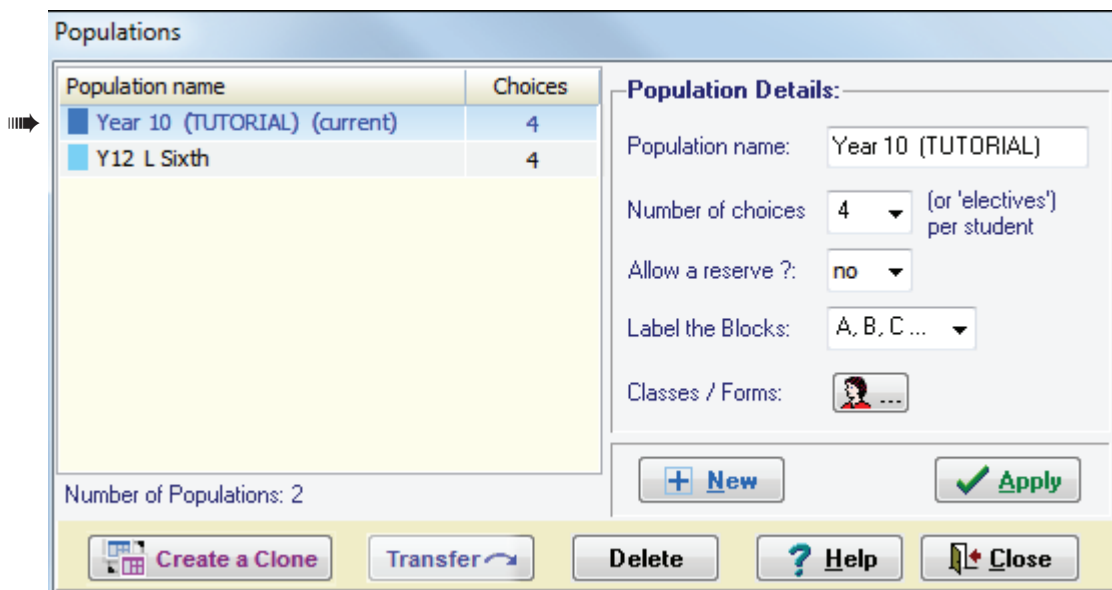
These sheets can include timetable details from **TimeTabler**, so that Students & Staff know exactly when to go to each subject lesson. And you can 'mail-merge' letters to parents.

This method saves a great deal of time & confusion at the start of the new school term.

**The rest of this Tutorial takes you through these 7 steps.**

# 1 Populations Screen

- 8  Action! Click on the First button on the Overview Screen, to see the Populations Screen, shown below:



Population name	Choices
Year 10 (TUTORIAL) (current)	4
Y12 L Sixth	4

Number of Populations: 2


**Population Details:**

Population name: Year 10 (TUTORIAL)

Number of choices: 4 (or 'electives' per student)

Allow a reserve?: no

Label the Blocks: A, B, C ...

Classes / Forms: 

+ New Apply

Create a Clone Transfer Delete ? Help Close

The screen shows that two Populations have been entered for you.

"Year 10 (TUTORIAL)" is the Current population.

(The name is echoed at the bottom of the main screen).

**Make sure you use this one for the Tutorial.**



It consists of 101 Students, in Year 9 at present.

Whichever Population is selected here, this is the one that is worked on in the remaining 6 steps.

Clicking on a row gives the Details for that Population in the boxes at the right-hand side.

In these boxes you could Edit an existing name, or enter new data, or allow students 1 or 2 **Reserve** choices, but please do **not** change anything until you have finished the Tutorial.

You can choose to label the Option Blocks, either: A, B, C ... or: 1, 2, 3 ...


- 9  Action! **Classes button**  Click on this button to View the names of the Classes (or Forms) of Students that make up this Population.  
For the Year 10 (TUTORIAL) Population there are 4 Classes: 9C, 9L, 9J, 9K.

There might be only one Class in a Population, or several.

eg. in a 6-form-entry school with the curriculum organised in half-year-groups, there might be 3 Classes in each Population (eg. 9A, 9b, 9red).

The **New**, **Apply** and **Delete** buttons are used in entering or deleting data, but please do **not** make any changes during this Tutorial, so that what you see will match these pages.

The **Clone** button allows you to experiment on a duplicate without altering the original.

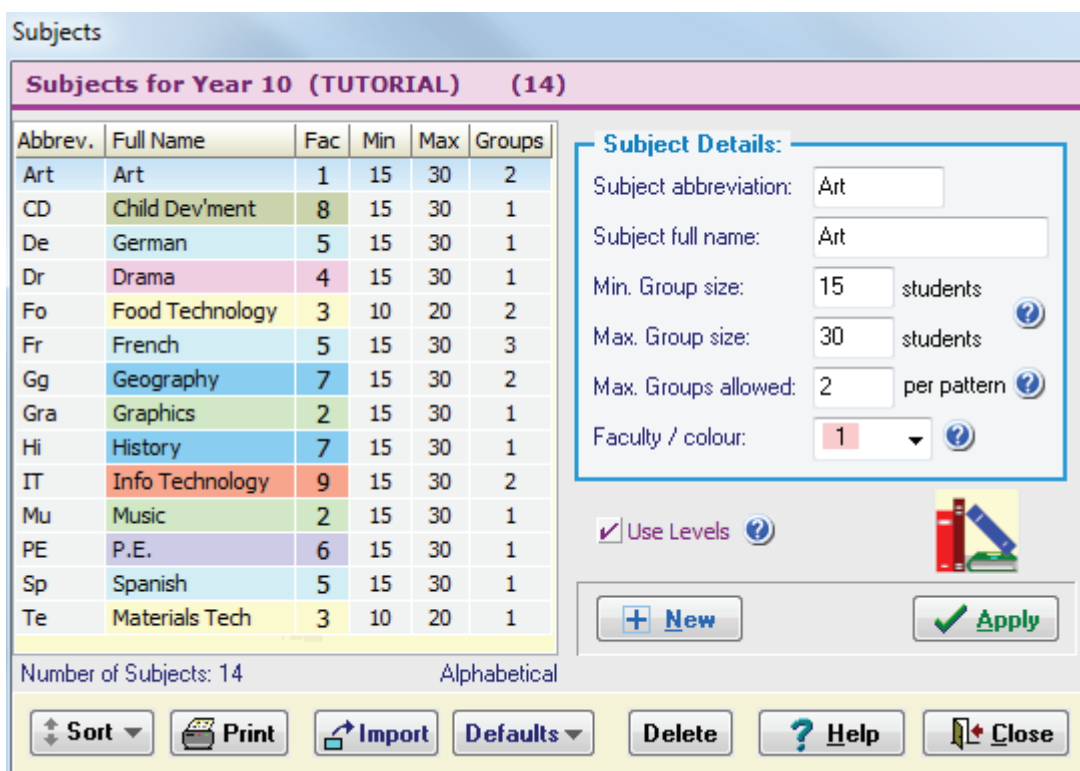
- 10  Action! Click on **Close** to leave the screen. Note: if you are asked whether you want to save any changes, please ensure that you answer **No**.



## 2 Subjects Screen

11   
Action!

Now click on the Second button on the Overview Screen, to see the Subjects Screen:



**Subjects for Year 10 (TUTORIAL) (14)**

Abbrev.	Full Name	Fac	Min	Max	Groups
Art	Art	1	15	30	2
CD	Child Dev'ment	8	15	30	1
De	German	5	15	30	1
Dr	Drama	4	15	30	1
Fo	Food Technology	3	10	20	2
Fr	French	5	15	30	3
Gg	Geography	7	15	30	2
Gra	Graphics	2	15	30	1
Hi	History	7	15	30	1
IT	Info Technology	9	15	30	2
Mu	Music	2	15	30	1
PE	P.E.	6	15	30	1
Sp	Spanish	5	15	30	1
Te	Materials Tech	3	10	20	1

**Subject Details:**

Subject abbreviation:

Subject full name:

Min. Group size:  students

Max. Group size:  students

Max. Groups allowed:  per pattern

Faculty / colour:

☒ Use Levels

Number of Subjects: 14      Alphabetical

To get more details about each part of the screen, click on the **Help** button, and then click **on each part of the image** that appears.

In particular, look at the messages you get when you click on the  parts about:

■ Min. Group Size    ■ Max. Group Size (see p. 37)    ■ Max. Groups allowed    ■ Faculty / colour

12   
Action!

On this Subjects Screen, enter a new subject by following these steps:

- Click on the **New** button. This empties the Edit boxes (in yellow) at the right-hand side.
- Now type in the 'Abbreviation' box: **Ph**
- then press the <Tab> key (next to the Q key), or click with your mouse, to move to the next box, and then type in (for 'Full name'): **Physics**

As usual you can change the details until it shows exactly what you want.

(If you want to escape and abandon it then just click on any row in the Subjects list.)

- When all is correct, click on **Apply** (or <Enter>) to confirm it, so it appears in the main list.

Enter other subjects in the same way, if you wish. Maximum number of subjects = 250.

Exactly the same method will be used on other screens later: ie. click **New** to start entering new data, and then you must click **Apply** to confirm the entry.

If you try to enter the same subject again, **Options** will give you a warning message.

**Options 'holds your hand' in this way, all the time.**

13   
Action!

Now click on **Close** to leave the Subjects Screen.

**Options** asks you: *Do you want to save the changes? Yes/No/Cancel*

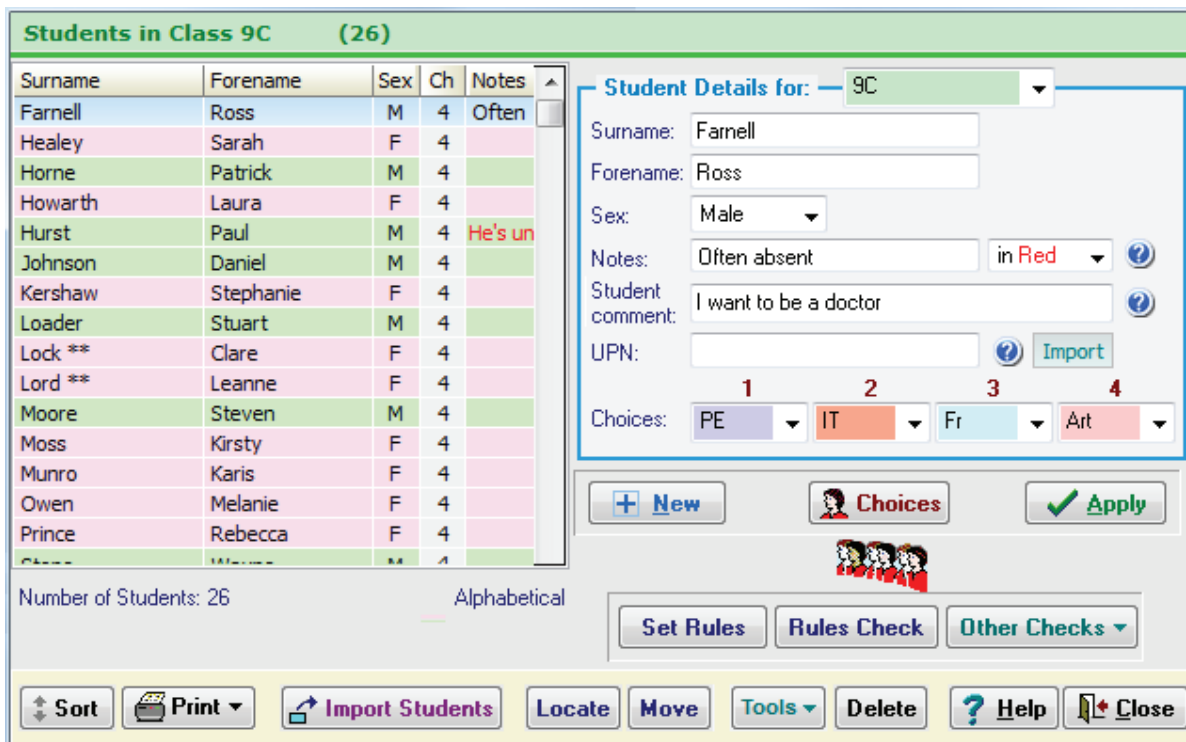
The usual answer is **Yes** to save the changes on to the disk (but for this Tutorial please answer '**No**'). Only changes saved on the disk are effective.

You will then arrive back at the Overview Screen.

### 3 Students & Choices Screen

14   
Action!

On the Overview Screen, click on the Third button, labelled **Students & Choices**:



Surname	Forename	Sex	Ch	Notes
Farnell	Ross	M	4	Often
Healey	Sarah	F	4	
Horne	Patrick	M	4	
Howarth	Laura	F	4	
Hurst	Paul	M	4	He's un
Johnson	Daniel	M	4	
Kershaw	Stephanie	F	4	
Loader	Stuart	M	4	
Lock **	Clare	F	4	
Lord **	Leanne	F	4	
Moore	Steven	M	4	
Moss	Kirsty	F	4	
Munro	Karis	F	4	
Owen	Melanie	F	4	
Prince	Rebecca	F	4	

Number of Students: 26      Alphabetical

Student Details for: 9C

Surname: Farnell  
Forename: Ross  
Sex: Male  
Notes: Often absent in Red  
Student comment: I want to be a doctor  
UPN:   
Import

Choices: 1 PE 2 IT 3 Fr 4 Art

+ New    Choices    Apply

Set Rules    Rules Check    Other Checks

Sort    Print    Import Students    Locate    Move    Tools    Delete    Help    Close

Four Classes of Students have been entered for you.

Please note that in the free Demo version, the students cannot be changed.

The main screen shows the Students, with their surname, forename, and sex.

The column headed 'Ch' (Choices) shows how many Choices have been entered.

Notes and UPNs (Unique Pupil Numbers) can be shown if you wish (see the Customize Menu).

The name of the Class that you want to display is chosen at the top right.

As usual, the **New**, **Apply** and **Delete** buttons would allow you to Add, or Delete students from the list, and you can Edit their details at any time -- but please do **not** do this during the Tutorial.

#### Choices row and Choices button

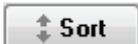
This area shows you this student's current Choices, and allows you to enter/change them. There are alternative methods, explained on pages 20–21. Choose the one that suits you.

#### Import button

The Students' **Names** (and also, if you wish, their Choices) can be entered

- from the keyboard, **or, more usually,**
- as a file from a school or college Admin system (eg. SIMS, iSAMS, SEEMiS, etc) that already contains their names. See the Help button and page 42 for more details.

**Move button**  allows you to move any Student(s) to another Class or Population.

**Sort button**  gives you 4 ways to sort the students' names.

**Locate button**  allows you to find any student quickly.

To email lists of the requests to Heads of Subject, use Print  Students by Subject (Email).

continued...

## Rules for Checking your students' Choices



Clicking on the Rules button takes you to the **Rules for Students' Choices Screen**:

Rules for Students' Choices for Year 10 (TUTORIAL)

Rule	Fac/Subj 1	Fac/Subj 2
Choose exactly one subject from this Faculty	Fac 2	-
Choose at least one subject from this Faculty	Fac 4	-
Choose no more than one subject from this Faculty	Fac 3	-
Choose <b>both</b> subjects 'as a pair' (or neither) ←	BTC1	BTC2
Choose at least one subject from EACH Faculty	-	-
Omit a maximum of ONE Faculty	-	-
Omit a maximum of TWO Faculties	-	-
Choose at least two subjects from EACH Faculty	-	-
Choose exactly two subjects from this Faculty	Fac 1	-
Choose at least two subjects from this Faculty	Fac 5	-
If choose subject-1 must also choose subject-2	F-Ma	Ma
Choose from Defined Sections	-	-
Choose number of subjects from each Faculty	-	-

Rule Details:

Rule: Choose both subjects 'as a pair' ▼

Subject 1: BTEC-1 (BTC1) ▼

Subject 2: BTEC-2 (BTC2) ▼

Suspend this rule ? ☐

Number of Rules: 13

You can use this screen to lay down Rules that your students' Choices must follow (but please ensure that you do **NOT** Apply and save any Rules while doing the Tutorial).

To apply a Rule, select it and its conditions in the boxes, then click on **Apply** (or press the <Enter> key). You can also **Suspend** or Delete the Rules if you wish.

Here are some examples, of the first four Rules. Click on the button for more examples.

### Example 1 Students must choose exactly 1 subject from Faculty 2.

If you had entered only Humanities Subjects in Faculty 2 (on the Subjects Screen), **Options** would tell you if a Student does not choose any Humanities subject, or if s/he chooses more than one.  
(The 'Faculty' does not have to be a real Faculty ...it is just a grouping of subjects for this purpose.)

### Example 2 Students must choose 1 or more Subjects from Faculty 4.

If you had entered only Science Subjects in Faculty 4 (on the Subjects Screen), then **Options** will tell you if a Student does not choose any Science subject.

### Example 3 Students must choose no more than 1 Subject from Faculty 3.

If Faculty 3 contains 'Drama', 'Performing Arts', and 'Expressive Arts' then you will be told if any student chooses two or more Subjects from this Faculty.

### Example 4 Students must choose both these Subjects, or neither.

eg. if they choose to study BTEC-1 then they must also choose BTEC-2 as well. You will be told if not.

There are more details in Appendix 7, page 56.

As you enter each student's Choices (as described on the next page), **Options** will automatically check your entries against your Rules.

It gives you a report when a Rule is broken, like this:  
Then you can counsel the student to make a better choice.

Rules Broken by Students in Class 9C (17)


Farnell, R (9C) chose 2 subjects from Faculty 2 [Rule 3]  
Healey, S (9C) chose no subject from Faculty 4 [Rule 4]  
Horne, P (9C) chose BTC1 but not BTC2 [Rule 5]

### Rules Check

On the Students Screen there is a Check button to make a global check at any time.

Any students infringing the Rules are then marked with a symbol:

## Entering Choices : 1 – Manually

- 15  If you collect the students' Choices on paper forms then you can choose from 3 quick ways for entering the Students' Choices. These 3 ways are explained on this page.

On the Students' Screen (shown on page 18), focus on the area showing the Choices for the currently-highlighted student.

For example, this screen:



Choices: 1 Hi 2 Fr 3 Dr 4 Ar

shows a student who wants:

1. History (Hi) as his highest priority 1st Choice,
2. French (Fr) as his 2nd Choice,
3. Drama (Dr) as his 3rd Choice, and
4. Art (Ar) as his lowest priority 4th Choice.

If you experiment here, when you click on **Close** to leave the screen, **please ensure** that you choose **No**, "do not save", so that the Demo-Data still fits the remaining steps of this Tutorial !

To experiment and change some of the students' Choices: Select a Student by clicking on a row, click on one of his or her Choice boxes (shown above), so that a drop-down list appears, and then use your mouse to select one of the Subjects on the list. **It's as simple as that !**

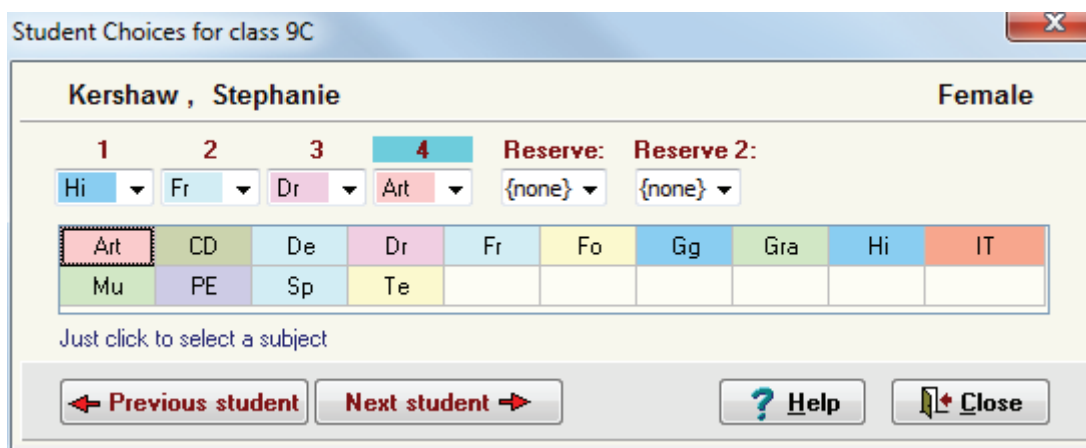
Page 39 explains an additional feature when entering Year 12 ('6th Form') choices, where there might be 5 Blocks but students only choose 3 subjects, with the others being 'free' time.

- 16  Action!

Still on the Students Screen, click on the button labelled **Choices**.



This new screen gives you more methods of entering the student's Choices very quickly:



Student Choices for class 9C

Kershaw , Stephanie Female

1 2 3 4 Reserve: Reserve 2:

Hi Fr Dr Art {none} {none}

Art	CD	De	Dr	Fr	Fo	Gg	Gra	Hi	IT
Mu	PE	Sp	Te						

Just click to select a subject

Previous student Next student ? Help Close

On this screen you can:

- use the drop-down boxes method as before, **or**
- just click on a Subject in the coloured Grid – **this is usually the fastest way**, or
- press the key of the initial letter of the Subject (eg. **F** for **F**rench).

As you click on each Subject, or press a key, **Options** moves you *automatically* to the next Choice (as shown by the blue highlight above it). Try it !

And you can move quickly through all the Students by clicking on the **Next Student** button. If you had chosen to include a Reserve Subject (page 16) then an extra box would appear.

**These features give you a very quick & efficient way of entering a lot of data quickly.**

Please remember, **in this Tutorial**, if you've made any changes to the students' choices, when you leave the **Options** screen via **Close**, please select **No** - do not save !

# Entering Choices : 2 – Students/Parents on-line

## The TOOLS on-line system

This is an alternative way of entering your Students' Choices, by using the on-line TOOLS system ('TimeTabler Options On-Line System').

This is a system to allow parents/students to select their optional subject Choices on-line, using the internet instead of the traditional paper method (see the previous page). This method means that you don't have to type the students' Choices into **Options** – the parents/students do it for you.

If you choose to use this system, you need the assistance of your IT Manager to install the necessary files on your school's Web-Server. We provide the files and full documentation on this.

Or, easier, it can be hosted for you, see more details at : [www.studentoptions.co](http://www.studentoptions.co)

There are 3 stages to the TOOLS system:

### Stage 1

After you have entered or imported your Students' Names from your MIS (see pages 18 and 42) a screen in **Options** allows you to print a letter to each Student/Parent which includes:

- a URL web-address eg. [www.myschool.sch.uk/options](http://www.myschool.sch.uk/options)
- an individual Username and Password/PIN.

### Stage 2

At home, the Student or Parent enters this URL on their computer or smartphone or tablet to see a Log-in Screen.

They enter their UserName and Password/PIN to see screens like these two:

Alternatively, your school Guidance Counsellor, sitting with the pupil, can use the screen, see Appendix 5.


The User enters their Choices and clicks on the 'Submit' button.

The system stores the result, and sends them an email confirming the Choices they have requested.

### Stage 3

You can see [on a Control Panel] when all the Students/Parents have entered their Choices. Then you can transfer the Choices to the **Options** program and proceed in the usual way.

On the Overview Screen (page 14) there is a button:

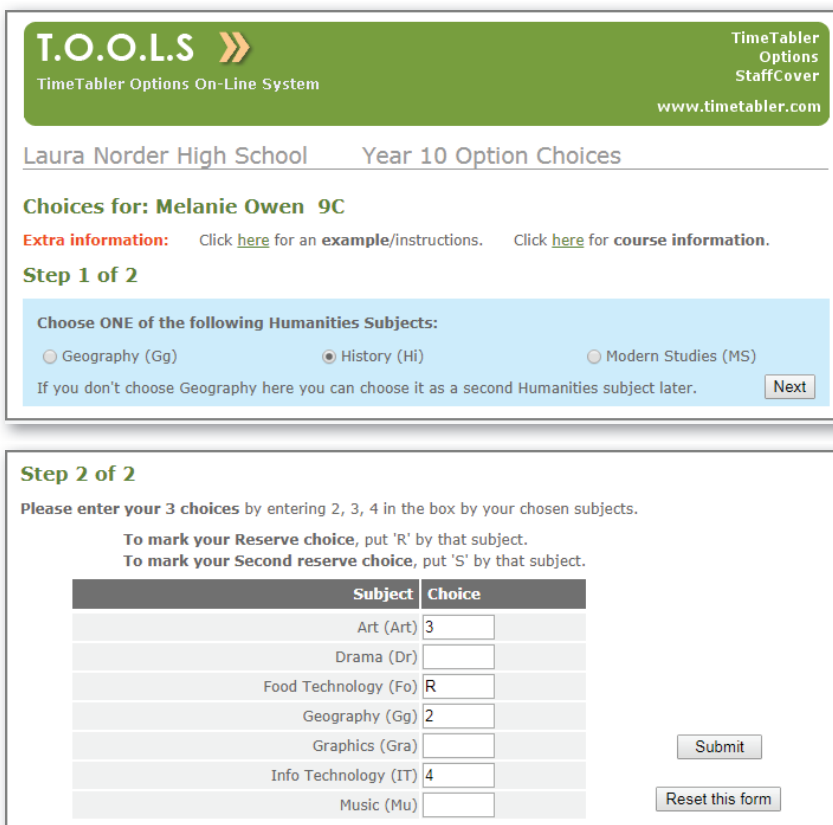
TOOLS on-line system 

Clicking on this gives you access to all the documentation for the TOOLS system.

A key feature of **Options** is the speed at which the data is entered.

Once you have entered your Students' Names (see pages 18, 42), and their Choices (see opposite and above), and checked any Rules (page 19) then you can begin to analyse the data.

This is covered on the next page.

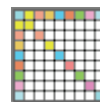


Subject	Choice
Art (Art)	3
Drama (Dr)	
Food Technology (Fo)	R
Geography (Gg)	2
Graphics (Gra)	
Info Technology (IT)	4
Music (Mu)	

## 4 The Clash Table

17  Action!

On the Overview Screen, click on the **Clash Table** button:  
**Options** quickly draws a Clash Table for you:



	Art	CD	De	Dr	Fr	Fo	Gg
Art	36	10	4	1	26	16	12
CD	10	19	5	3	12	0	2
De	4	5	24	4	4	7	3
Dr	1	3	4	14	6	2	1
Fr	26	12	4	6	63	27	22
Fo	16	0	7	2	27	40	22
Gg	12	2	3	1	22	22	31

The screen is re-sizeable  
...drag the bottom-right  
corner to the size you want.

The Clash Table shows each of the Subjects plotted against every other Subject. Each cell of the grid shows the Number of Students who have chosen to study those 2 subjects. *eg. in this table, 6 students want to study Drama (Dr) and French (Fr).* It gives you very useful information about the Choices of this particular population of students.

18  Action!

If you click on a Subject name, yellow 'cross-wires' are drawn to guide your eyes.

### Diagonal cells

The coloured boxes on the diagonal show the Total Number of Students choosing that subject. *eg. 31 students want to study Geography Gg (see the Clash Table above)* You can use this to decide how many teaching groups should be staffed (see below).

### Other cells

If a number is zero, no-one wants to do that pair of subjects, so you can safely put them in the same Option Block. *eg. the subjects CD and Fo shown above.*

If a number is low, you may want to counsel those few students, to see if they have made good choices, and for a definite purpose, to see if you can cancel a group altogether.

19  Action!

### Other information

If you click on any cell, you can view (and print out) the **Names** of those Students. To do this, first click on the cell and then:

- either **right-click** with your mouse and choose 'View these students',
- or click on the **Students** button at the bottom.

The **Combinations** button allows you to enter any combination of subjects, and **Options** will then tell you which students (if any) have chosen that combination.

The **View missing** button lists any students not yet included because they have not made all their choices. Click on the Help button for more details.

You can **Print** and **Export** the Clash Table to send it to colleagues.

### Last column at right-hand side

The column at the extreme right shows the Number of Groups that will be required to cope with the number of students. It uses the Minimum and Maximum numbers per group that you entered on the Subjects Screen (see page 17).

If it is in red (as a warning to you), it means that the Number of Groups that is needed is more than you said were available (on the Subjects Screen).

The next step is start Designing a Pattern to try out.



## 5 Library Screen

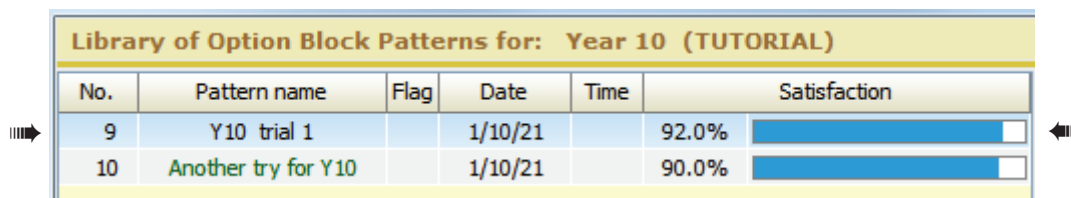
20   
Action!

Go back to the Overview Screen and click on the 5th button labelled: **Design a Pattern**

You are taken first of all to the **Library Screen**.

This shows any Patterns of Option Blocks that have already been designed and stored (for this current Population). (There is a limit of 120 Patterns stored at any time.)

The screen shows that 2 Patterns have been tried and stored:



No.	Pattern name	Flag	Date	Time	Satisfaction	
9	Y10 trial 1		1/10/21		92.0%	<div></div>
10	Another try for Y10		1/10/21		90.0%	<div></div>

There are 4 ways forward from here.

The 4 ways are listed below, but for the purposes of this Tutorial please choose **only** the **First** one now.

1. If we want to **View** or **Modify** an existing Pattern, then

- we select it by clicking on it, and
- then we click on:



2. If you wanted to start a New Pattern, and design it Yourself, manually, then

- you would click New, enter a New Name, and click Apply,
- then click on:



*Do not choose this method at present.*

3. If you wanted to start a New Pattern, and design part of it Yourself, manually, and then get **Options** to design the rest of it for you, automatically,

- then you would start a New pattern as in (2), and click on:



*Do not choose this button at present.*

4. If you wanted to start a New Pattern, and get **Options** to design all of it for you, automatically,

- you would just click on:



*Do not choose this button at present.*


Auto-Create will create a Pattern for you, automatically. See also pages 34-39.

21   
Action!

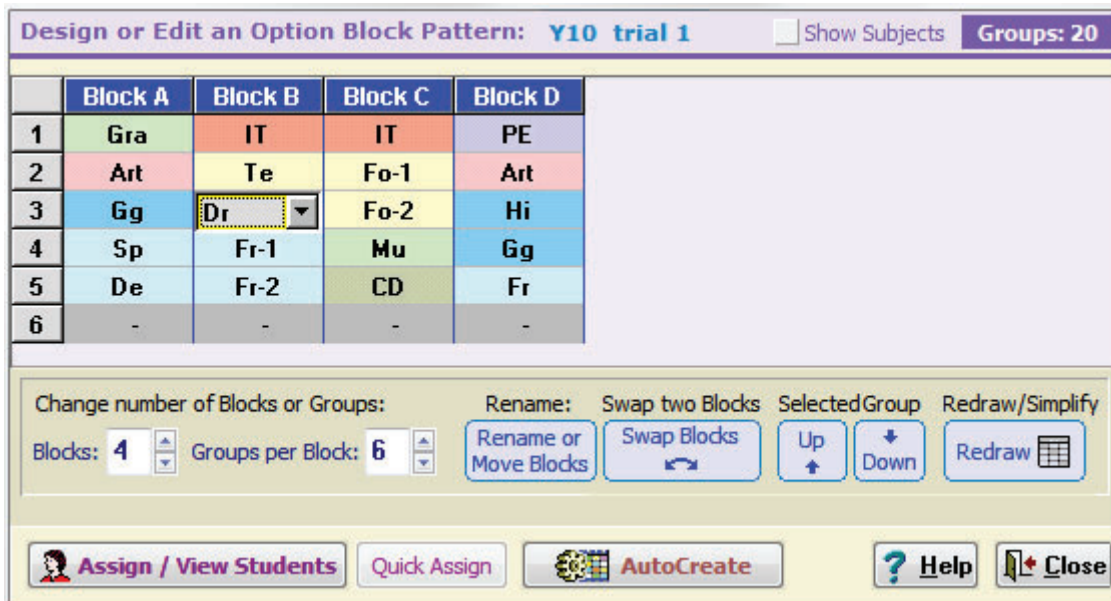
Please ensure that the top Pattern (“Y10 trial 1”) is highlighted (in blue) and then click on:



# Designing an Option Block Pattern

22 

You should now see a Pattern that was designed earlier, like this:



	Block A	Block B	Block C	Block D
1	Gra	IT	IT	PE
2	Art	Te	Fo-1	Art
3	Gg	Dr	Fo-2	Hi
4	Sp	Fr-1	Mu	Gg
5	De	Fr-2	CD	Fr
6	-	-	-	-

This screen allows you to quickly design an Option Block Pattern.

**Please take care not change any Subjects in this Pattern at present.**

The Blocks are labelled A, B, C.... or 1, 2, 3.... depending which you choose on the Populations Screen. The maximum number of Blocks is 25 !  
All the Subjects in a Block will be scheduled at the same time on the timetable.  
The maximum number of groups per block is 80.

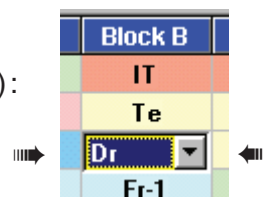
Note : You can increase or decrease the number of Blocks, and the number Groups vertically in each Block (see the bottom left of the screen).

## Adding or Changing a Subject

This is very easily done, but please take care not to change the Subjects from those shown above, so that the next pages of the Tutorial will still make sense.

To change a subject:

- Click on any cell to see an arrow as shown here for Drama (Dr):
- Click again to see a drop-down list of all your Subjects.
- Then just click on the Subject you want in this cell.



**It's that easy !**

If you wanted to **Delete** a Subject, you'd select the dash ( - ) from the drop-down list (at the top of the list), and afterwards click on **Redraw** to shuffle up the lower subjects.

23   
Action!

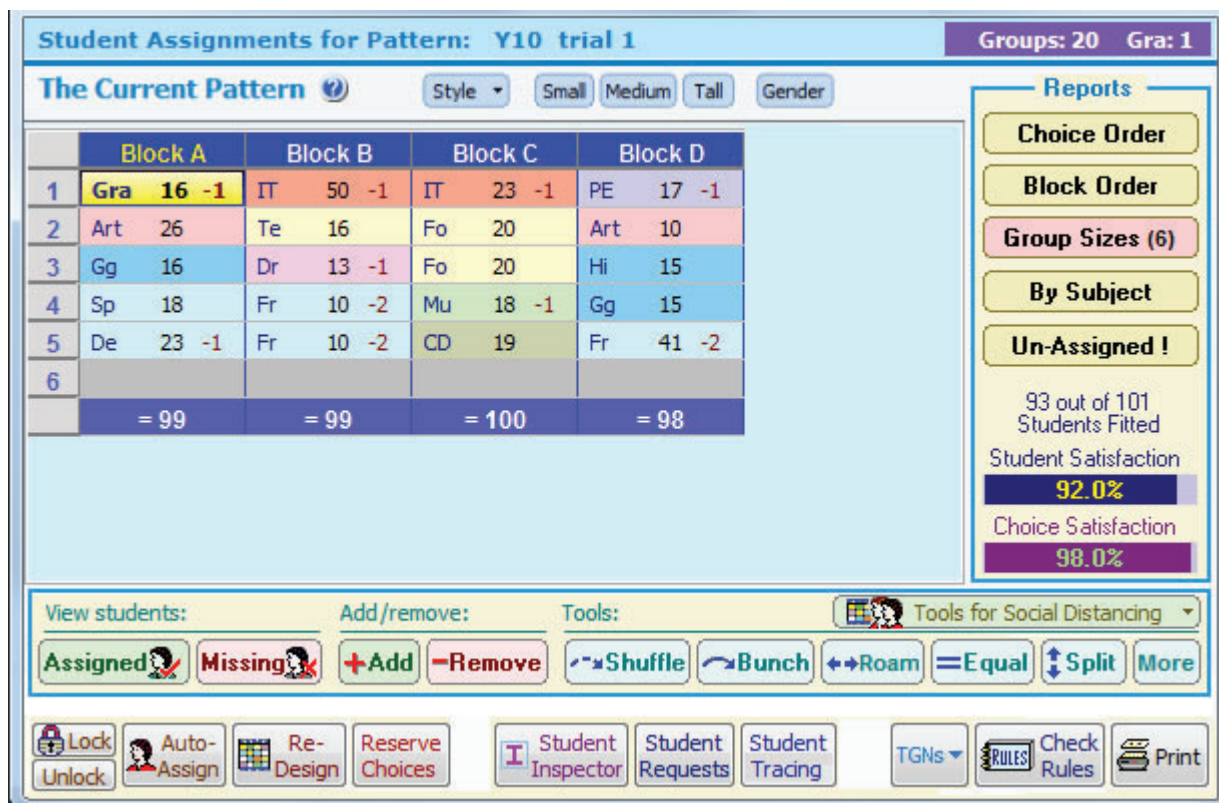
Please check that all the Subjects are exactly the same as in the picture shown above.

Then click on the **Assign/View Students** button in order to move to the Assignments Screen.  
If you see questions then: Click **Yes** to 'Do you want to Save?', then **Yes** to 'Do you want to re-assign students?', click 'Auto-Assign now', and **No** to 'Do you want to Lock some students?'.





## 6 Assignments Screen

24  This is the Main Screen in **Options**:



**Student Assignments for Pattern: Y10 trial 1** Groups: 20 Gra: 1

The Current Pattern  Style  Small Medium Tall Gender

	Block A	Block B	Block C	Block D
1	Gra 16 -1	IT 50 -1	IT 23 -1	PE 17 -1
2	Art 26	Te 16	Fo 20	Art 10
3	Gg 16	Dr 13 -1	Fo 20	Hi 15
4	Sp 18	Fr 10 -2	Mu 18 -1	Gg 15
5	De 23 -1	Fr 10 -2	CD 19	Fr 41 -2
6				
	= 99	= 99	= 100	= 98



**Reports**



- Choice Order
- Block Order
- Group Sizes (6)
- By Subject
- Un-Assigned !











93 out of 101 Students Fitted

Student Satisfaction **92.0%**

Choice Satisfaction **98.0%**

View students: Add/remove: Tools:  Tools for Social Distancing 

Assigned  Missing  +Add -Remove Shuffle Bunch Roam Equal Split More

Lock  Auto-Assign  Re-Design  Reserve Choices  Student Inspector  Student Requests  Student Tracing  TGNs  Check Rules  Print 


This screen allows you to manipulate & experiment with different Patterns, and immediately see the effect on Groups Sizes, the Satisfaction Rate for the students, etc.

### Cells

The coloured cells show the Subjects that were chosen at the Design stage on the previous screen.

Each cell is in the 'faculty' colour that was chosen on the Subjects Screen.

Each cell shows:

- the Subject abbreviation (eg. **Fr**),
- the number of Students who have been assigned satisfactorily to this group, **Options** does this for you automatically. (You can also show  Boys/Girls separately.)
- the number of Students (eg. **-2**) who chose this subject but who could not be fitted.

### Totals row

This row shows the total Number of Students that have been fitted in each Block above. For a perfect solution each of these numbers will equal the total number of Students.

### Auto-Assign

This button automatically assigns all the Students in this Population into the current Pattern, taking account of their 1st Choice first, 2nd Choice next, etc.

### Re-Design

This takes you back to the Design Screen (opposite page) so that you can alter the Pattern.

There are many useful Reports and Tool buttons that you can use on this screen. They are described on the next 2 pages.

## REPORTS

At the right-hand side of the Assignments Screen there are 6 buttons which give you Reports:

### Choice Order

Choice Order

This Report lists all the Students (in all the classes in this population) with the choices that they made (ie. as you entered them on the Choices Screen).

In this Report, the Subjects are arranged in the order of the student's Choices. ie. with their 1st choice shown first, 2nd choice next, etc.

### Block Order

Block Order

This Report lists all the Students (in all the classes in this population) with the choices that they made (ie. as you entered them on the Choices Screen).

In this version of the report, the Subjects are arranged in the order of the Blocks. ie. with the subject allocated to the 1st Block shown first, 2nd Block next, etc.

Subjects that have been fitted are shown in black and unfitted Subjects in red. 'NP' = Not Placed.

### Group sizes

Group Sizes (2)

This Report tells you which Groups appear to be too big or too small. It also tells you if you have added more Groups to this pattern than you said you intended to.

It uses the criteria that were entered on the Subjects Screen (page 17).

*eg. if you specified a max group size of 20 for Technology, this report will tell you if any Technology group is bigger than 20.*

*eg. if you said you were going to use only 2 French groups but you've put 3 groups in the current pattern, this report will tell you.*

### Assignment by Subject

By Subject

This is an alternative way of displaying the Current Pattern. It is useful if you want to analyse your Pattern subject-by-subject rather than block-by-block. Click Help for more details.

### Un-Assigned

Un-Assigned !

This Report shows which Students have not yet been satisfactorily placed in the current Pattern:

You can use it to help you decide whether to add any more Groups to the current Pattern. (To do this, click on the **Re-Design** button.)

Un-Assigned Choices									
Student	ch1	ch2	ch3	ch4	A	B	C	D	
Shaw, N	Te	PE	IT	Fr	Fr	Te	IT	PE	
9C F	B-2	D-1	C-1	NP: A	NP: A	B-2	C-1	D-1	

You can use this Report to help you counsel students to choose a different subject, one that will fit the current pattern.

### Student Satisfaction

This shows the satisfaction rate for the **Students**.

*eg. if 50 Students in a population of 100 Students got all their Choices, then the Student Satisfaction rate would be just 50%. Obviously the aim is 100%.*

### Choice Satisfaction

This shows the satisfaction rate for the total Choices made by the students.

*eg. if 25 Students each made 4 Choices (so that 100 Choices were made), and only 80 Choices were satisfied, then the Choice Satisfaction rate would be just 80%. The aim is 100%.*

**Assigned** to, or **Missing** from, this Subject

Assigned

Missing


This shows the Students that have asked for, and have been successfully assigned to, or have not been able to get, the Subject in the highlighted cell. (You can also **right-click** on the cell.)


### Compare two Patterns

Compare

This button is on the Library Screen (page 23). Use the Help button for more information.


## TOOLS

**Add**  This button allows you to add a Student to a particular group. You can also do this by right-clicking on the cell. See also the Shuffle button.

**Remove**  This button allows you to remove a Student from:


- a particular Group, or
- all the Groups to which s/he has been assigned.

To collect more than one student, hold down the <Ctrl> key while clicking.

**Shuffle**  If you want to move students between 2 groups of the same subject, then

- click on one of the Groups, and then click on the Shuffle button. See also page 33.


You will see 2 lists (of the 2 groups). If there are more than 2 groups of this subject, click on 'Next group' until you see the 2 groups you want. Drag-and-drop to move the student.

**Bunch**  If you have 2 or more Groups of the same Subject, then you can:

- click on one of the Groups, and then click on the Bunch button.

**Options** will then attempt to bunch the Students into the selected Group, at the expense of the other group(s) of that Subject. If the other group(s) shrinks sufficiently, you may be able to delete it from the Pattern, to give a less-expensive solution.

**Roam**  Lets you see what would happen if a Group moved to another Block/Column.

**Equalise**  If you have 2 or more Groups of the same Subject, then you can:

- click on one of the Groups, and then click on the Equal button.

**Options** will attempt to equalise the Students between the groups, to give a fairer work-load for the Teachers involved. (Like Bunch, it looks for moves between 2 or more groups of 2 or more subjects.) However, often, equalising some groups will disadvantage other groups.

**Split** 

If any group becomes too big then you can Split it into 2 (equal size) groups with this button. Then use the Shuffle button to fine-tune the membership of each group.


**More**  This gives you 12 more tools: Sorting Blocks, Merging Groups, Satisfaction, etc.

 **Tools for Social Distancing** See [www.timetabler.com/covid-19/](http://www.timetabler.com/covid-19/) for full details.

**Auto-Assign** 

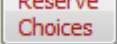
This button assigns all the Students in this Population into the current Pattern, taking account of their 1st Choice first, 2nd Choice next, etc. You can choose to **Lock** some students first. You can use it to re-set all the group sizes if you alter them while using other tools.

Use the **right-click** Menu if you want to **Lock** a Group or a Block first:

 Lock this Group  
Lock this whole Block  
Lock all Groups of this Subject

**Re-Design** 

This takes you back to the Design Screen (page 24) so that you can alter the Pattern.

**Use Reserves**  If you have chosen to include 1 or 2 Reserve Subjects (page 16), then click here to let **Options** use the Reserves if they will give a better satisfaction rate.

**Student Inspector** 

This takes you to the very useful Student Inspector Screen described in Appendix 1.

**Student Requests**  to help keep students together, or keep them apart.

**TGNs (Teaching Group Names)**  See Appendix 4 and the Help button for details.

## A worked example

25 

Let's look now in detail at this pattern, its problems and how to resolve them.  
The current pattern you should see at this stage is (as at Step 24) :

	Block A	Block B	Block C	Block D
1	Gra 16 -1	IT 50 -1	IT 23 -1	PE 17 -1
2	Art 26	Te 16	Fo 20	Art 10
3	Gg 16	Dr 13 -1	Fo 20	Hi 15
4	Sp 18	Fr 10 -2	Mu 18 -1	Gg 15
5	De 23 -1	Fr 10 -2	CD 19	Fr 41 -2
6				
	= 99	= 99	= 100	= 98

Clearly there is a problem about IT in Block B, and about French in Block D. You can see the groups are too big. (The Group Sizes button will also tell you this.)

There's more than one way to solve this.

One way would be to add an extra IT group in Block B and an extra French group in Block D, but this can be expensive in staffing.

A better way in this case is to add an IT group to **Block D**.

26   
Action!

Please do this now, by following these 3 steps:

- Click on the **Re-Design** button to go to the Design Screen.
- Click on the grey box for Group 6 under Block D.  
(Click 'Groups per Block' to make it 6, first, if necessary.)  
Click again to see the drop-down list of subjects, and choose **IT**.
- Click on **Assign/View Students** and **Yes** (Save) and **Yes** (Re-Assign) and then **Auto-Assign now** (leaving the two defaults of 'Apply loosely' and 'No, reassign, don't Lock'), to come back to the Main Assignments Screen (above) with all the 101 students re-allocated to this new pattern.

Groups per Block: **6**

Can you see that it has solved the problems for both IT and French. **Quickly!**

The pattern you should now see is:

	Block A	Block B	Block C	Block D
1	Gra 16 -1	IT 26	IT 22	PE 17 -1
2	Art 26	Te 16	Fo 20	Art 10
3	Gg 16	Dr 14	Fo 20	Hi 15
4	Sp 18	Fr 22 -2	Mu 19	Gg 15
5	De 23 -1	Fr 21 -2	CD 19	Fr 18 -2
6				IT 26
	= 99	= 99	= 100	= 101

In the next section, 14 practical questions are asked about **this** pattern, for you to attempt to answer, using the various Tools & Reports. The Answers are given as well.

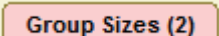
## Worked examples 1 - 3

The next steps of this Tutorial explore each of these Reports & Tools, in a problem-solving way, with a series of **Questions** with **Answers**.

27   
Action!

### Q1. Which Groups are still too big or too small?

#### Answer 1

Just click on the pink  button at the top right.

It tells you that 2 Groups (Drama in Block B, and Art in Block D) are smaller than the minimum Group-Size (15) that was specified for each of them on the Subjects Screen.

It also tells you that 3 Groups have been provided in this pattern for IT, whereas on the Subjects Screen a maximum of 2 was specified.

Notice that on the main screen the problem groups are now highlighted: 

At any time you can go back to the Subjects Screen to change the max/min values, in which case this report will change accordingly.

This report is for information only . . . it does not prevent you working on this pattern.

28   
Action!

### Q2. How many of these 101 students have been fitted?

#### Answer 2

Look at the right-hand side of this Assignments Screen.

It says that 96 of the 101 Students have got all their choices fitted OK.

This is 95% Student Satisfaction.

The 5 students that are not fully fitted are the reason why the totals in the blue bottom row of the grid do not show 101 under each column.

When all the Students are fitted, all the totals will equal the number of students in this population (101).

The other percentage shown on the screen is the Choice Satisfaction.

This may be a better guide to developing a successful pattern.

29   
Action!

### Q3. Who are the 5 students who have not been fitted?

#### Answer 3

Click on the  button in the Reports section.

It lists the names of the 5 students that are not fitted, with information about:

- their Class/Form,
- which Subject choices have been fitted, and into which Blocks,
- which Subjects are Not Placed (NP), and which Blocks the student isn't yet assigned to.

This gives you clues about which Subject you might need to add to a Block to solve this student's request.

Note: you can drag the smaller screen to any convenient position on the screen (just drag with your mouse on the title bar).

## Worked examples 4 - 5

30   
Action!

**Q4. The first person on that list is Nina Shaw.  
What would you say to her?**

### Answer 4

The report given by clicking on  shows that the situation for Nina Shaw is:

Un-Assigned Choices									
Student	ch1	ch2	ch3	ch4	A	B	C	D	
Shaw, N	Te	PE	IT	Fr	Fr	Te	IT	PE	
9C F	B-2	D-1	C-1	NP:A	NP:A	B-2	C-1	D-1	

You can see immediately that:

- she is **Not Placed** (NP:A) to any subject in Block **A**, and
- she chose French (Fr) but the current pattern does not allow her to study it. This was because it was her 4th Choice. Her higher Choices prevent her from getting French in this pattern.

If you are not going to change the pattern, you will need to counsel her to choose differently. You can suggest:

- either that she chooses another subject instead of French. She must choose one subject from Block A. For example, if the rules say she must study a Modern Language, she could choose Spanish or German in Block A.
- or that she puts French as a higher choice and chooses another subject for her 4th choice, one that fits the pattern. If you wish you can enter her new choices and then see whether they fit & how big the groups will be.

For the best way to do this, see the **Student Inspector Screen** described in Appendix 1.

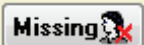
31   
Action!

**Q5. Who are the two people not able to do French?**

### Answer 5

Click on **any** of the 3 French cells in the grid on the main screen.

Then:

- either click on the **Missing** button, 
- or **right**-click with your mouse, and choose **Students missing this Subject**
- or press <Ctrl M> (ie. hold down the <Ctrl> key while you tap the <M> key).

Any of these actions gives you a list of the Students not able to do this subject. It is a sub-set of what you get from the **Un-Assigned** button.

Notice that the -2 in each of the 3 French groups refers to the same 2 students. There are only 2 students unable to study French.



## Worked examples 6 - 9


**Note:** If at any stage you feel that you have spoiled the pattern, you can return to the original pattern by clicking on **Auto-Assign**.

32  Action!

**Q6. Who are the 14 students doing Drama?**

**Answer 6**

Click on the cell labelled Dr (Drama), in Block B. Then:

- either click on the **Assigned** button, 
- or right-click with your mouse, and choose Students in this Group
- or press <Ctrl G> (ie. hold down the <Ctrl> key while you tap the <G> key).

Any of these actions gives you a list of the Students assigned to this subject.

33  Action!

**Q7. How can I get a printout of the 14 people doing Drama?**

**Answer 7**

Use any of the steps described in the answer to the last question, then click on the **Print** button at the bottom of the list.

34  Action!

**Q8. Sarah Healey in 9C comes to discuss her choices. What information can you display during the discussion?**

**Answer 8**

Click on the **Choice Order** button to see her choices in order: 1st Choice, 2nd Choice, etc. (Sarah is the second one on the list, in 9C.)

Healey, S	Dr	IT	Sp	Mu
9C	F	B-3	D-6	A-4
				C-4

If Music (Mu) is still her least-favourite subject, and she wants to change it, you can discuss the possibilities.

Click on the **Block Order** button to see how her choices have been allocated to the Blocks:

Healey, S	Sp	Dr	Mu	IT
9C	A-4	B-3	C-4	D-6

Her Music group is in Block C (see above) so you can offer her other Subjects from Block C, unless they are too full. Keeping to Block C will not need any changes to your Pattern.

In this example (see the Main Screen), there is probably room in IT or CD, but Fo (Food Technology) is probably full.

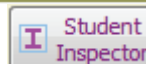
35  Action!

**Q9. If she decided to change her Subject Choices, what would you do?**

**Answer 9**

Click the **Student Inspector** button, to see the screen shown in **Appendix 1**.

**Review & Counsel**



This shows all the information you need, and allows you to drag-and-drop with your mouse, to change her subject Choices and Allocations. Click the **Help** button for more details.

## Worked examples 10 - 12

**Note: If at any stage you feel that you have spoiled the pattern, you can return to the original pattern by clicking on Auto-Assign.**

36   
Action!

**Q10. How can you get a hard-copy of this pattern?**

**Answer 10**

Just click on the **Print** button at the bottom of the screen.

37   
Action!

**Q11. What happens if you try to Bunch students into the Geography (Gg) group in Block A ?**

**Answer 11**

Click on the Gg group in Block A.

Then click on the  button, then **Yes**.


This Gg group grows in size, at the expense of the Gg group in Block D.

Notice that it also affect the Art groups (in Blocks A and D), because it is the students who have chosen Art & Gg that are swapping between the groups.

The Gg group in Block D now consists of only 5 students.

It might be possible to counsel these 5 students to drop Gg, or to change their choices so that they get Gg in Block A . . . in which case you could cancel this Gg group and so save the staffing costs, or use the staff elsewhere.

You can now try Bunching the students the other way, into the other Gg group.

You can try the  button with other subjects having 2 or more groups.  
eg. French (Fr), Art (Ar), IT, Fo (Food Technology).

 is a more controlled way of moving students between groups (see opposite).

Click the **Auto-Assign** button if you want to get back to the original assignments.

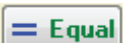
38   
Action!

**Q12. What happens if you try to Equalise students between the 2 Art (Ar) groups (in Blocks A & D) ?**

**Answer 12**

You may wish to click on **Auto-Assign** first if you want to get back to the original assignments.

Click on one of the Art groups (Block A or Block D).

Then click on the  button, then **Yes**.

The 2 Art groups are equalised in numbers (as much as is possible with these students' choices). This would usually be an advantage to the Art teachers.

Notice the damaging effect this has on the size of the Gg group in Block A.

Quite often, equalising one Subject in order to balance the teaching load on the staff, has an adverse effect on the groups of another Subject.


Now try equalising Gg. How does this affect Art?



## Worked examples 13 - 14

Some final questions for you to tackle using the Tools in **Options**.

39   
Action!


**Q13. There are 2 French groups in Block B. They are to be 'setted' into higher & lower abilities.** (Note: if there is only one group, use  to make 2 groups.)

**Suppose you have printed out the list of students (see Question 7) to give to the Head of Department, who then decides who is in the higher & lower groups. How do you move the students to the correct group, so printouts will be correct?**

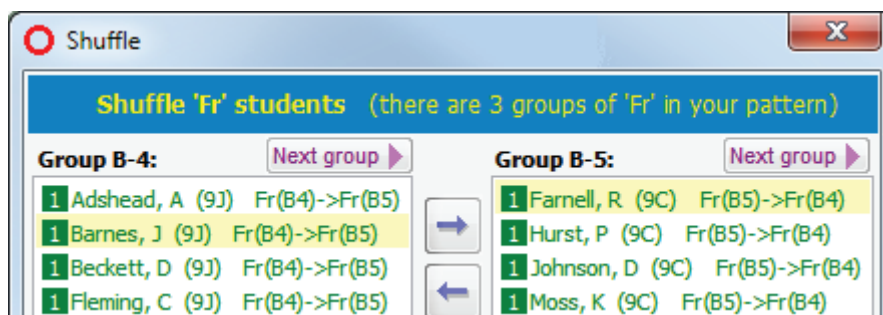
### Answer 13

You could use 'Remove' and 'Add', but here is a better way.

Click on one of the two French groups in Block B, and then

- either click on the  button, or press the <Ctrl-S> keys
- or right-click with your mouse, and choose **Shuffle Students**

You are shown two lists, of the students in the French groups at present:



If the correct two French groups are not shown, click on 'Next group'.

Highlight a student, then click on a blue arrow or drag-and-drop with your mouse. In this way you can quickly move particular students between groups.

The students are shown in 4 colours, see Appendix 6 page 55 for more details.

40   
Action!

**Q14. Some students are doing Art (Ar) & Geography (Gg). For example: Hurst, P and Johnson, D in 9C. Because both Ar & Gg are in both Block A & Block D, the students can be allocated as**

A	B	C	D		A	B	C	D
Ar	-	-	Gg	or as	Gg	-	-	Ar

**How can you change round the way they have been allocated?**

### Answer 14

This is basically the same as Question 13. Use **Shuffle** to move a student from one Art group to the other. (**Options** will then move the student between the Gg groups automatically.)

See also Appendix 11, page 58, for why you might want to do this.

---

This is the end of the step-by-step Tutorial. Other features of **Options**, including:

- **Auto-Create**,
  - Individual Student Timetable printouts,
  - Group Lists for Staff, etc.,
- are explained on the next 28 pages.

# Using Auto-Create



Auto-Create

As well as manually building up and adjusting a Pattern (using the **Re-Design** button), you can also get the **Options** program to devise a Pattern for you, *automatically*.

This is a very powerful tool to get an initial Pattern, which you can then 'tweak' manually if you wish.

To create a Pattern entirely automatically,

1. Click on **Design a Pattern** to go to the **Library Screen** (see page 23),



2. Click on the Auto-Create button:



Auto-Create

3. You are shown the **Auto-Create Screen**:

You can customize Auto-Create by clicking on the **Customize** button.

This gives you a choice of the Method and the Constraint Factors that the program will use as it develops a Pattern.

See below for more details.

4. Click **Go**:



The bars show you the progress, and up to four Patterns are displayed, for you to save if you wish.

The 'Auto-Create a Pattern' screen displays instructions to click 'Customize ...' or 'Go'. It features progress bars for 'Student satisfaction' (84%) and 'Choice satisfaction' (95%). A 'Currently analysing' bar is also present. At the bottom, there are buttons for 'Customize ...', 'Go', a timer '0:15', and 'Minimize (hide)'.

Auto-Create gives each resulting Pattern a name, but you can rename it if you wish. Before starting Auto-Create you can set some Rules for the Pattern (see page 38).

## Customize...

If you click on the Customize button then you are shown this screen:

In most cases we recommend that you keep to these Default values:




If you wish to change any of these values, please read pages 36 – 39 first.

The 'Customize the Auto-Create Method' screen provides settings for the scanning method, constraint factors, pattern shape, and students. It includes dropdown menus for 'Scanning method' (1. Thorough scan for 4 solutions), 'Depth of Search' (2. Standard), 'Speed of Search' (1. Default), 'Constraint Factor' (2. Optimize groups using Clash Table), 'Max. group sizes' (1. Apply loosely & use own judgement later), 'Pattern Shape' (Number of Blocks: 4 (same as number of choices)), and 'Students' (Try to Assign: All Students). The screen also has buttons for 'Defaults', 'Rules', 'Font', 'Help', and 'Apply'.

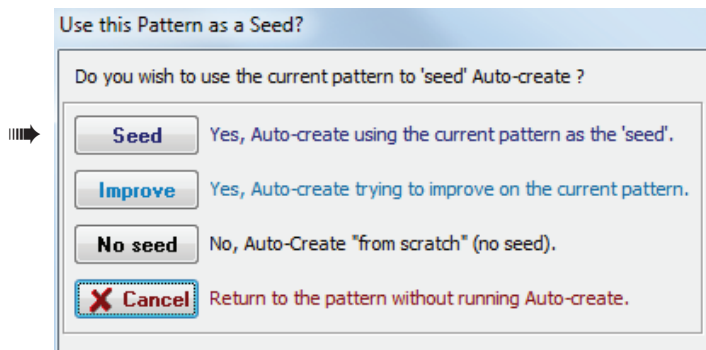
## Seeding Auto-Create

As well as getting Auto-Create to devise a complete Pattern for you, you can also begin a Pattern manually, and then use this as a '**Seed**' for Auto-Create to complete.

To do this,

1. Click on **Design a Pattern** to go to the **Library Screen** (see page 23), 
2. Click **New**, enter a new **Name** for the Pattern and then click **Apply**,
3. Click on  **View Pattern**
4. Design as much of the Pattern as you wish (as described at Tutorial step 22),
5. Click on the Auto-Create button shown at the bottom of that screen. 

The choices you are offered are:



6. Choose the **Seed** button.
7. Then use **Customize** and **Go** as described on the opposite page.

Notes:

- a) Your original 'seed' pattern can be stored as well as any new pattern(s) created by Auto-Create. This allows you to review the 'seed' pattern, make a small change and then re-run Auto-Create.
- b) The more groups you place in the seed, the more constraints you are placing on Auto-Create, and so it is less likely it will find a good solution.
- c) You can use a non-seeded Auto-Create to create a basic pattern. Then strip out any problem groups, and use the remaining pattern to seed Auto-Create again. This time you may get a better solution.

## Improve a Pattern

At steps 2 & 3 above, instead of creating a new pattern, you can choose an Existing Pattern that you want to improve.

Then when you click on AutoCreate as at step 5 above, you can choose the **Improve** button (on the screen shown) to see if this Pattern can be improved.

*For example*, if you had used 'Standard' search depth but would now like to see if some of the groups can be moved using the 'Deep' search depth, to get a better Pattern with a better Student Satisfaction. So you start with your existing pattern (which might be good but not yet ideal) and ask AutoCreate to 'improve it / explore variations'.

*For example*, you might create several quick patterns first at Standard depth, and then if you like the look of one of them, improve it at Deep depth. Or if you have a new student join, or an existing student change his choices, you can try improving the existing pattern rather than starting from scratch.

It works like 'Seed', except that **Improve** is happy to move around any existing group if it would improve the satisfaction (whereas 'seed' is not allowed to move any existing group; it has to keep them all where they were and can only add new groups to the Pattern).



# Customizing Auto-Create



Click on the **Customize** button (see page 34), to change how you want **Options** to work.  
In most cases it is best to keep to the Default values.

## 1. Scanning Method (4 possibilities)

Scanning method: 1. Thorough scan for 4 solutions

### 1. Thorough scan for 4 solutions (Default):

Time: with a large population this may take some time to complete.

This looks at many algorithms for creating Patterns and shows the 4 Patterns with the highest %satisfaction, one of which will be the 'best' solution as found in method 2 below.

### 2. Thorough scan for 1 solution:

Uses the same algorithms (and time) as in (1) but displays only the 'best' solution.

Use it only if you don't feel the need to decide between the 4 solutions of method 1.

**3. Brief scan for 1 solution:** Time: quicker. Can be used if methods 1 or 2 take too long.  
Uses fewer algorithms to find an 'acceptable' solution ... not necessarily the very best.

These first 3 Methods can have different **Constraints** applied to them (see below), and different **Depths of Search** (see below).

### 4. Feasibility scan (with no limits on the number of Groups):

Time: quickest. This will create a pattern for you that tries to fit **all** students choices, but without any constraints on the number of Groups!

This shows a 'perfect' solution to the students' choices if your school had unlimited resources!

You will probably get several small groups (you can try **Bunch** to eradicate some of them).

## 2. Depth of Search

There are 5 possibilities, which take different amounts of time:

If you use 'Standard' depth initially then you can use 'Improve' later (see page 35).

Depth of Search: 2. Standard

- 1. Shallow (half the standard time)
- 2. Standard
- 3. Deep (double the standard time)
- 4. Take Shortcuts (for big populations)
- 5. Take further Shortcuts

## 3. Speed of Search (3 possibilities)

The default is recommended unless (in a very big school) the program is taking a very long time (eg. many hours).

Speed of Search: 1. Default

- 1. Default
- 2. Full search (but may take some time)
- 3. Faster (but may not find all the solutions)

## 4. Constraint Factor (3 possibilities)

Constraint Factor: 2. Optimize groups using Clash Table

### 1. Use Maximum groups per subject

Level of constraint: lowest. Allows a subject to have up to the number of 'max. groups' specified on the Subjects Screen, regardless of how small those groups might be.

*eg. If you have said you will allow up to 3 Music groups, then if only 3 people chose Music, you might get 3 groups each with only 1 student.*

### 2. Optimize using Clash Table (Default, Recommended):

Level of constraint: medium. This allows a subject to have up to 'x' groups where:  $x = (\text{Number of Students taking this subject}) \div (\text{Max Size of a group of this subject according to Subjects Screen})$ .

However, x is never allowed to be greater than the number of 'Max. Groups' specified on the Subjects Screen. *eg. if 60 students chose Physics, and Max students per group for Physics = 25, then up to 3 groups are allowed on the pattern. However, if you set the Max Groups allowed for Physics to be 2, only 2 groups would be allowed.*

**3. Use 1 group per subject:** Level of constraint: highest. Each subject can have only 1 Group.  
If resources are very tight, you could try this first to see how many students cannot be fitted.

continued...

## 5. Maximum Group Sizes

There are 4 possibilities:

1. Apply 'loosely'. (The default, strongly recommended, see below),
2. Apply strictly (this is severe; the limit cannot go over by even 1 student!).
3. Allow up to +10% (so if the limit is 20, then up to 22 students allowed in a group).
4. Allow up to +20% (so if the limit is 20, then up to 24 students allowed in a group).

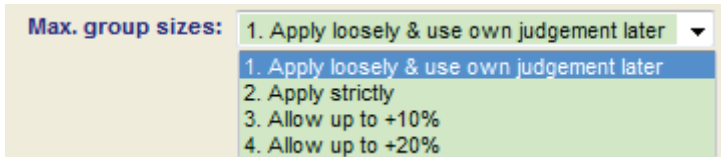
The reason why we strongly recommend 'loosely' (the default) is:

if you said a max. of 20 students can take Art, then a group of 24 students might still be created in the pattern, but it is highlighted in red to warn you that you need to look at this group, and decide what to do:

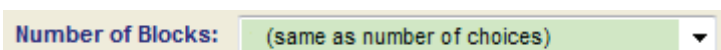
- Can we allow more than 20 students after all ? (Perhaps it's a very able group of model students?)
- Can the group be split into 2 groups ?
- If we really can only allow 20 students, **which** 4 should we disappoint ?
- What Reserve Choices do those 24 students have – could some be satisfied by their Reserve ?

We take the view that 'loosely' is the best way forward, because it allows you to answer these questions and to consider all the possibilities, whereas a 'strict' interpretation of the Max. Group Size would simply say that 4 of those students could not be satisfied, with no human judgement applied. That approach would be hard to justify to any parents who complained.

However, the stricter settings are available if you feel differently about how to handle group sizes.



## 6. Number of Blocks



Unless you are using the 'Student Pathways' feature (page 39), then you will usually want to leave this as the default. ie. the Number of Blocks = (max) Number of Choices each student has made.

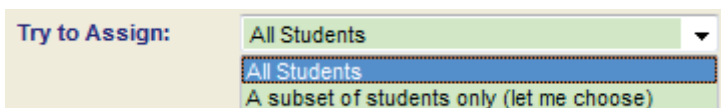
## 7. Try to Assign:

### Assigning a sub-set of Students

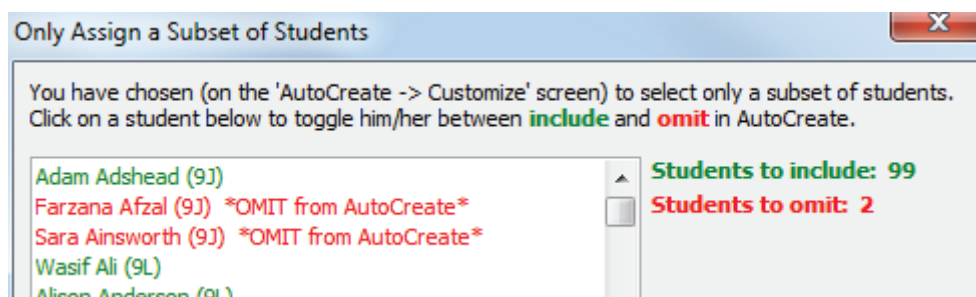
You can perform 'What if's...?' with AutoCreate, so you can investigate what solutions would be possible/available to you, if you omitted some of the students.

*For example*, in looking for a Pattern for the new Year 12, you may wish to (temporarily) omit students who are doubtful about returning in the Sixth Form, to see what Pattern & Satisfaction could be achieved for the students who you think are sure to return.

If you choose to use a Sub-set then you are shown a list of the Students so you can click to omit the ones you wish:



(For safety's sake, this choice is reset at the end of each session so that when you restart **Options** next time, all students will be ready to be assigned again.)



Although AutoCreate ignores the red students in creating its pattern(s), once those patterns are stored in the Library (at the end of AutoCreate) then any red students are brought back and assigned against that pattern as best they can be (ie. the red students were not considered in creating the pattern, but at the end we nonetheless fit their choices into the pattern where possible, so you can see what the overall satisfaction is).

Patterns created via this method are marked in the Library with a double-asterisk\*\*

You can also constrain the pattern by using **Rules** (see the next page).



## Rules for building a Pattern of Option Blocks

You can specify Rules that must be followed when building a Pattern of Option Blocks. The Rules are applied whether you are working interactively to build a Pattern, or using Auto-Create.

Click on the **Design a Pattern** icon:



to go to the **Library Screen** (page 23),

and then click on the  button.

This takes you to the **Rules for a Pattern Screen**:

Rules for AutoCreate for Pattern Solution 90

**Pattern Rules** ?

Rule	Details
1 Subjects MUST be in the same block	Art, Gra
2 Subjects MUST be in the same block	BTC-1, BTC-2
3 Students must be grouped consistently	HSC1, HSC2
4 Subjects confined to specific blocks	(see the list)
5 Limit groups-per-block for this subject	Geog: limit = 1
6 Limit groups-per-block for this faculty	Faculty 5: limit = 2
7 Use Student Pathways	(see the definition)

**Rule Details:**

Rule: Subjects MUST be in the same block

Subject 1: Art (Art)

Subject 2: Graphics (Gra)

Suspend this rule ? ☐

Apply

Suspend all Un-suspend all

+ New Delete Print ? Help + Close

You can use this screen to lay down Rules that Auto-Create must follow. Select the Rule and its conditions in the boxes, then click on **Apply**.

When you run Auto-Create, it will only display solutions that follow the Rule(s) that you have applied (unless you insist on a 'Seed' that breaks the rules).

If you build up a Pattern yourself, interactively, you will be warned if you break any of the Rules.

**Note :** that applying any Rules can severely limit the possibility of finding a good solution.

**You should only use a Rule if it is really necessary!**



Some Examples of these Rules are shown in the box on the next page.

Even if you decide to apply a Rule, it is usually a good idea to also run AutoCreate **without** any Rules, to see what the possible Satisfaction Rate might have been, and how much it has been affected by applying your Rule. When you apply a Rule, Auto-Create usually takes longer to find a solution.

**Note :** When you start a new Pattern, its Rules are **inherited** from the last Pattern you viewed. This may not be what you want, in which case go to the Rules Screen and delete the Rules for the new Pattern.

You can also **Suspend** a Rule, or all the Rules, and later Un-suspend them (see the screen above).

continued...

## Some Examples of the 7 Rules

**Example 1** Subjects **MUST** be in the same Block.

*For example*, you want Art and Graphics to be in the same Block (for some good curricular reason, perhaps for shared activities).

**Example 2** Subjects must **NOT** be in the same Block.

*For example*, BTEC-1 and BTEC-2 must be in different Blocks, because they form a double option.

**Example 3** Students must be placed in the groups **CONSISTENTLY**.

*For example*, if HSC1 and HSC2 form a double-option, and if there is more than one group of each, then the students must be assigned consistently, so the groups are not mixed up.

**Example 4** Subjects to be confined to specific blocks, via a grid:

Click on the **Help** button, to see 5 examples of using the control grid.

List the confined subjects

**Example 5\*** Limit the Number of Groups in any block, for this Subject.

*For example*, if you only have 1 Music teacher, but 2 (or more) Music groups, you can use this rule to say only 1 Music Group per Block. Similarly if you have only one 'Food' room.

**Example 6\*** Limit the Number of Groups in any block, for this Faculty

Note: the 'Faculty' does not have to be a real faculty ...it is just a convenient grouping of subjects.

*For example*, if you are offering Spanish and French and Italian but you have only 2 MFL Teachers to teach these 3 subjects, then you don't want more than 2 groups of any MFL subject in any block.

\* These two Rules are particularly useful for Scottish schools building Columns.



**Example 7** Use student 'Pathways'. *For example*,

- some students are on a 'Blue' Pathway (with choices from one list of subjects), and
- other students are on a 'Green' Pathway (with choices from a different list of subjects), but they have some subjects in a common block. For more details use the Help button.

## Year 12 ('Sixth Form') Options

'free'

In the UK education system, the students in Year 12 often do not have a full timetable. They have Private Study or 'free' periods.

For example, the **Options** Pattern may have 5 Blocks (or 'Pools' or 'Columns') but each student may choose to study only 4 or fewer subjects.

In this case you simply enter a Subject (on the Subjects Screen) called **free**.

Then you give each Student a full number of Subjects, by adding 'free' to their choice of subjects.

For example, in a 5-Block pattern, a Student might be entered as having chosen:

**Maths Physics Chemistry free free**

Then make sure that you add **free** as a subject to each Block of the Pattern.

To see an example of this in the Tutorial data, go to the Population Screen and choose the second Population (called "Y12 L Sixth"). If you then visit the Students & Choices Screen, and the Design a Pattern->View Pattern Screen, you will see how **free** has been used with these Year-12 students.

**Note: there is an important and useful difference between:**

- specifying 'free' as the subject (which will not give a warning Report), and
- specifying '—' (no choice) as the subject.  
This will give you a warning Report, via the Un-Assigned button on the main Assignments Screen, to remind you that this student has not yet chosen a full set of subjects.

# Entering your own data - 1

Once you have completed the Tutorial, and have a good overview of the different parts of **Options**, you will want to begin entering your own data.

There are 2 main ways you can do this:

1. Just leave the Tutorial data in place, and add your own data (as a new Population).  
You can delete the Tutorial data later if you wish.
- or
2. Completely delete all the data and begin from scratch.  
To wipe out the data you can use File ► Blank data on the File Menu.

Start with the **Overview Screen <F2>** (page 14), and work your way across the 7 buttons.

## Step 1

First, on the **Population Screen** (page 16), enter a new Population by following these steps:

- Click on **New** (so the Edit boxes turn yellow).
- Type in a name for your Population (eg. "Year 10 Options").
- Select the number of Choices the students can make (by clicking on the drop-down list).
- Reserve Choices: select if you want your Students to have 0, 1 or 2.
- Choose whether to label the Block A, B, C ... or 1, 2, 3 ...
- Click on **Apply** so that the Population appears on the list.
- Click on the **Classes ...** button.
- Click on **Add**, and enter the name of a Class in this Population.  
Repeat this step until all your Classes are entered, then **Close** this sub-screen and click **Yes** to save the data.

Then click on **Close** and **Yes** to close the Population Screen and save your data.

You can go back and edit it any time you wish (eg. to change Year 9 names to Year 10 names).



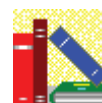
## Step 2

Then go to the **Subjects Screen** (page 17).

- You are offered the choice of loading in a default list of Subjects, to edit or add to. This is usually quicker than typing the whole list in.
- Or you can Import a file of Subjects from your main Admin System.  
Click on Help for more details.
- To Add subjects click on **New** and enter the details (remembering always to click on **Apply** after each one, to put the details into the list)
- To Edit an existing Subject, click on the Subject in the list so that its details appear in the Edit boxes, then Edit the details as you wish, and remember to click on **Apply** to confirm them in the list.

When you have finished, click on **Close**, then **Yes** to save the new data.

As usual, you can go back later and Edit or Add if you wish.



continued...



## Entering your own data - 2

### Step 3

Then go to the **Students Screen** (page 18), and use one of these 2 methods:

- A. Use the '**New**', enter details, click **Apply**' route that you used on the other screens, to type in their names.  
It is usually quicker to enter all their names first, and then add their Choices later.  
or, better:
- B. If you have a file of the students' Names already entered in an Admin System (eg. SIMS, iSAMS, SEEMiS, PASS, etc) you can **import** them electronically.  
See the next page (page 42) for more details of how to do this.  
(If you want to import their choices as well, click on the **Help** button for details.)



If you have any **Rules** about how you can choose subjects, enter the Rules as on page 19.

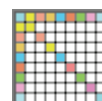


Then enter their **Choices** using one of the 3 methods described on pages 20-21.



### Step 4

Then you can use the **Clash Table** (page 22) to analyse your data.



### Step 5

Use the details on pages 23-27 and pages 34-39 to **Design a Pattern**, either interactively or using Auto-Create.

Enter design Rules if you wish (page 38), but be aware that they may prevent a solution.



### Step 6

Then fine-tune it to the needs of your students as described in the Tutorial, pages 28-33.

Counsel your students as necessary, see Appendix 1.

You can get a printout of the Pattern for consultations (pages 25-26, 43) and you can print out (or email) preliminary Group Lists for your colleagues (see pages 49, 52).



When you have finalised the Pattern you can also 'mail-merge' letters to send to Students or Parents (see Appendix 3).

### Step 7

When you have finalised the Pattern, and when the timetable has also been finalised, load in the timetable data, either automatically (page 44) or manually (pages 44-47), and then print out:

- Individual Student Timetables, and
- Teachers' Group Lists.



Then, if your MIS/Admin system supports the feature, export the Students' Names for each Group accurately and quickly, via a file from **Options** to your MIS (see page 50).

# Importing Students' Names (and even Choices, if known)



If you have your Students' Names already entered in an Admin System (eg. SIMS, iSAMS, SEEMiS, etc) you can export a file of the names, and then import that file into **Options**. This will save you a lot of time. For full documentation on how to do it for these MIS, visit the **KnowledgeBase** in the Support Centre, and see the list of MIS at: File Menu ► Import from...

For other MIS not on that list, when exporting the data from your Admin System,

- You can save it as a 'CSV' (comma-separated-values) file, or as a 'Tab', 'space' or 'xls-style' file.
- You can save it to a local hard-disc or network server if **Options** is on the same machine or network as the Admin System; otherwise save it to a USB FlashDrive 'memorystick', or Dropbox, etc.

Then, in **Options**:

1. Go to the **Students Screen** (page 18) and (at the top) choose the **Class** into which you wish to import the students.

2. Click on to see the **Import Screen**:

3. **Step 1 :**

Click on and then 'browse' to steer your way to open your file of Students' Names.

4. Select the correct 'Delimiter', and click on **Preview my File** to see the fields in this file.

**Import from 3rd-Party File into 9F**

**Step 1: Choose the file to import from:**

Import Filename is: K:\Options\Students.csv  
 Delimiter is: Comma  
 Preview my File >

**Format of this file is:**

Field 1	Field 2	Field 3	Field 4	Field 5
AdminNo.	Surname	FirstName	ClassName	Gender
1922210	Farnell	Ross	9F	M
1922211	Healey	Sarah	9F	F
1922212	Horne	Patrick	9F	M

**Step 2: Choose fields to import:**

Surname is field: 2  
 Forename is field: 3  
 Gender is field: 5  
 UPN is field: 1  
 Header is: one line  
 Class is field: 4  
 Class name: 9F

**Step 3: Preview of students who will be imported:**

Preview the Import >

Surname	Forename(s)	Sex	UPN	Class
Farnell	Ross	M	1922210	9F
Healey	Sarah	F	1922211	9F
Horne	Patrick	M	1922212	9F
Howarth	Laura	F	1922214	9F
Hurst	Paul	M	1922215	9F
Johnson	Calum	M	1922216	9F
Kaye	Tessa	F	1922217	9F

5. **Step 2 :** Choose the fields that you wish to import. Study the example above to see how this is done.

**Class name field :** If the file contains data for more than one Class, you need to specify which Class to import on this occasion, by entering the name of the Class you want to import now. Other Classes in the file will be ignored for now; so repeat the process later for each class.

Class is field: 4  
 Class name: 9F

(If 'Class is field' is set to 'None', all students in the file are imported to the Class chosen in step 1.)

**Header is :** The file may have a 'header' line(s) as shown above (AdminNo., Surname, etc). In the box select how many of these lines should be ignored, so that you get the students' names only.

(Note : If you also wish to import their Choices, eg. from a spreadsheet, click on the **Help** button.)

6. **Step 3 :** Click on **Preview the Import** to see the students' names.
7. If the list is correct, click on the **Import** button to do the import. Click on **Help** for more information.

Notes:

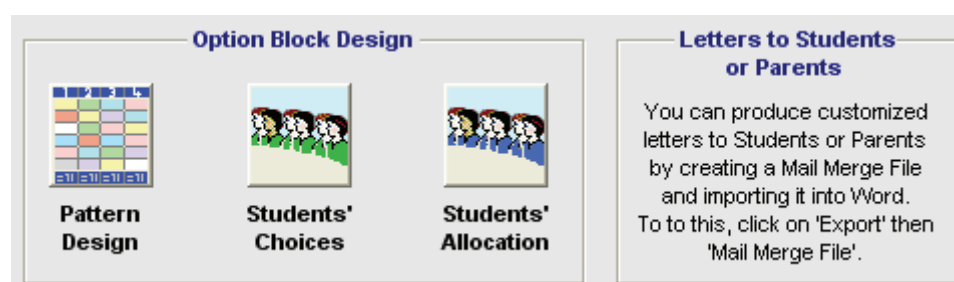
- i) Any Name that is too long for **Options** is truncated and shown in red so that you can see them. You can edit them on the Students Screen if you wish. Any blank fields are shown in grey.
- ii) If you haven't imported the Gender, everyone is assumed to be the default sex pre-set on the Customize Menu, so you may need to correct individuals, on the Students Screen.
- iii) The UPN will be shown on the Students Screen only if you choose this on the Customize Menu.
- iv) If you forget to import the UPN you can import/add it later, see the Students & Choices Screen.
- v) For importing the students' Choices see pages 20-21 and [www.timetabler.com/TOOLS](http://www.timetabler.com/TOOLS)

## 7 Final Printouts

Print

When you have got a Pattern, then you have a choice of Printouts:

Use the Help button on each of these screens for more details.



Then you will normally move to the timetabling stage so that you can schedule the lessons to particular times of the week, using **TimeTabler**.

**After you have finished scheduling**, if you wish you can return to the Options Pattern in order to enter:

- the Teachers,
- the Times of the lessons,
- the Rooms.

If you wish you can also enter these details for the 'Core' Subjects (eg. Maths, English, etc).

Entering these details allows you to print out:



■ **Individual Student Timetables**, to give to each student.

These can be printed as a timetable grid (showing teacher/subject/room, see page 48) or as a list. These timetables can include details of the Core Subjects as well as the optional subjects.

See also **TimeTabler** for an alternative way of doing this, though if your MIS (admin system) can give you these printouts, that may be the best way (after an export-import from **TimeTabler** to your MIS).

This is the most effective way of ensuring that each student gets their correct timetable, for a smooth start to the term.

■ **Group Lists**, to give out to members of staff (see page 49).

These show the correct members of each Group, as well as the rooms and times. They can be used as registration or attendance lists.

You can enter the data for all the scheduled lessons, either:

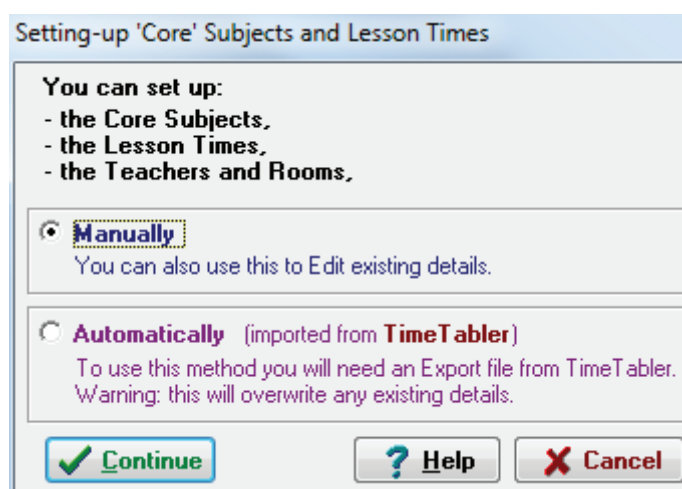
- **manually**, or
- **automatically**, using a file from **TimeTabler**.

After loading the data in automatically, you can edit the data manually if you wish.

To start this process, move to this screen: by clicking on:

Print

and then on:




The automatic method is described on the next page, and the manual method on pages 45- 47.

## A Transferring your data from *TimeTabler* to *Options* automatically

This can be done quite quickly using a 'Block Label' ('Block ID') in *TimeTabler* to ensure that each group in your Options Pattern gets the correct Teacher/Subject/Room/Lesson-Times during the week.

### In *TimeTabler*

1. On the Customize Menu, ensure that ☒ Use Block IDs (as Labels) is ticked.
2. In the usual way, load the Schedule that you want to transfer to *Options*, and then use  to go to the Class Timetable Screen (section F14 in the current *TimeTabler* Manual).

For each Teacher-team that you wish to label (see below),

Click on the relevant cell in the grid, and then

Click on the Details button (or double-click on the cell). This gives the screen shown in F20 in the Manual, with the Block Label box showing at the bottom:

Block Label: **D**

#### For Option Blocks :

For each Option Block teacher-team, enter its Block ID (a single letter or number) and then click **Apply**.  
eg. for Block **B** in your Options Pattern in *Options*, enter **B** as the Block Labels in *TimeTabler*.

If necessary, look in *Options* or use the printouts from *Options* to ensure you use the correct ID.

(Note : you can also enter these Block Labels, *before* or *after* scheduling, on the Activities Screen.)

#### For 'setted' Core Subjects (eg. Maths sets, English set, etc.) :

In these cases you do not need to enter a Block Label.

However you should enter a Set Number for each group, on the same screen (and click **Apply**).

#### For 'class-taught' Core Subjects (eg. PSE is taught to the whole class as one group) :

In these cases you do not need to enter anything at all. *Options* will pick them up automatically.

3. Go to Export to ... TT-Options, and follow the instructions to save the data to a memorystick. During the export you can get a printout of the Block Labels to check them.

### In *Options*

1. If you haven't already renamed your Classes, for the new year-group (grade) they will be in next term, now is a good time to do it, via Populations Screen->Classes->Rename. eg. 9J becomes 10C.
2. Go to the screen shown on page 43, select **automatically**, and then **continue**.
3. Follow the instructions to load in the data-file (called TT-OPT.csv, from step 3 above).  
If your Subject names in *Options* and *TimeTabler* do not match, you are shown a list. If so, you will need to Edit the ('Abbrev') Subject name in either *Options* (page 17) or *TimeTabler* (section C6).
4. You are asked to select the Scheduling Name, as used in *TimeTabler* to schedule this Population of students. There are 2 possibilities :
  - a) If the Scheduling Name is a single Class, eg. **10A**, then the program moves on to step 5.
  - b) If the Scheduling Name is a composite Class, eg. **10AB** in this example, then another screen is displayed :  
so that you can specify which Classes in this Population (eg. 10C, 10L) relate to 10A, 10B (the sub-sets of 10AB).
5. Click OK to complete the import and see a report.  
If necessary, correct any errors and repeat the export-import.

**Class Scheduling Names in TimeTabler**

Scheduling Name for this Population is: **10AB**

The Classes in this Population are:

<b>10C</b>	10A
<b>10L</b>	10B

- Then :
- i) Go to 'manual' entry/edit (pages 45 - 47) and check the data have all loaded correctly.
  - ii) If you have some 'setted' Core Subjects (eg. Maths) then for a fully-detailed Student Timetable you must assign the students to the correct sets, as described half-way down page 46.
  - iii) If you want to change the period labels or add period-times, see step 1 on page 45.

**Assign Students to Sets ...**

Then go to the **Printouts** sections (pages 48-49).

## B Editing or entering the timetable data manually

You can use these steps,

*either*: to edit data that has been loaded automatically from **TimeTabler** (see opposite) ,  
*or*: to enter your timetable data **manually** after scheduling is completed.

There are 3 parts to the process:

1. Edit or set up the shape and labels of your school week,
2. Edit or add the 'Core' Subjects to the timetable grid (optional),  
ie. subjects such as English, Maths, PSE, if they are not part of the Option Blocks.  
If any of these Core Subjects is 'setted', then you must also assign students to particular sets.
3. Edit or specify the Lesson Times for the Option Blocks and the Core Subjects.

Each of these steps is described in turn, over the next 3 pages.

### Step 1. Setting-up the shape and labels of your school week.

Go to the **Printouts Menu -> Publishing -> Day & Period Labels**:

You can then specify the days in your week,  
and the periods in a day.

The default shows Mon, Tue, Wed, etc.,  
but you can edit them to Day1, Day2, etc if you wish.

Other tabs or buttons allow you to:

- Alter the way the periods will be labelled.  
eg. 1, 2 or period 1, period 2, etc.
- Decide whether there should be a second row of  
labels, eg. for the times.  
This allows you to have, for example:  
period 1                      period 2                      etc  
9.00 - 9.50                      9.50 - 10.40
- The Printout format button lets you choose the size  
and font used for the title, and lets you modify  
the width of the left-hand margin space.

You can come back and change any of these later.

Day and Period Labels

**School Week** Day Labels Period Labels

Shape of the School Week:

Week length: 5 Days

Day length: 5 Periods

Student Timetables:

Show separate headings for each Day ? ☐

Colour Printouts:

Show printouts in colour ? ☒

Defaults Printout Format

continued...

## Step 2. Editing or Adding Core Subjects to the data

The program already knows about the Option Blocks, but it also needs to know details of the non-optional 'Core' Subjects, if they are to appear on the Student Timetables.


If you are only going to print out the Option Group Lists (page 49), you don't need to do this Step 2.

There are 2 kinds of 'Core' Subjects:

- 'Setted' Subjects** If a subject is taught in parallel groups, rather like an Option Block containing only one subject, then this subject is 'setted'.  
*eg. if Maths is taught in 4 parallel sets, often with students coming from more than one class.*
- 'Class-taught' or 'Form-based' Subjects** In this case a subject is taught on a whole-class (whole-form) basis.  
*eg. if the whole of 10A are taught PSE together.*

### a) Setting-up the 'setted' Core Subjects (eg. like the Maths example above)

Move to the entry screen, either

- via the **Overview Screen** <F2>, click on item 7:  and then Lessons & Times: and then: 'Manually' and 'Enter or edit details of Core Subjects that are setted',
- or
- on the **Lesson Times Menu**, choose: **Core Subjects – Setted.**

	Mon	Tu
1		
2		
3		

Core Setted Subjects for Year 10 (TUTORIAL)

Abbrev.	Full Name	No. of Sets
En	English	4

**Core Setted Subject Details:**

Subject abbreviation:

Subject full name:

No. of sets:

Faculty / colour:

Number of Subjects: 1

If you have loaded data automatically from **TimeTabler** (page 44) the Subjects will already be listed here.

This screen is very like the entry screen for Subjects (see page 17). Use it in the same way.

For each of these Core Setted Subjects, you then need to assign the students to the correct sets, by clicking on the **Assign Students to Sets** button:  This takes you to another screen.

The quickest way to use the new screen is to:

- Click on the **Set 1** button,
- Run down the column for the (first) Subject, clicking against the name of each student in Set 1,
- Repeat for other sets, and then other subjects.

You can have up to 26 sets. For Set 7 and above, use the box at the right-hand side.


A bright red background warns you if you have entered a number greater than the number of sets.

You can click on a column header to re-order the lists:

- by alphabetical student's name within a class, or its reverse,
- by students in 'set' order within each subject, or its reverse.

### b) Editing or setting-up the 'Class-taught' Core Subjects (eg. PSE)

Move to the entry screen, either

- via the **Overview Screen** <F2>, click on item 7:  and then Lessons & Times: and then: 'Manually' and 'Enter or edit details of Core Subjects that are Class-taught',
- or
- on the **Lesson Times Menu**, choose: **Core Subjects – Class-taught.**

	Mon	Tu
1		
2		
3		


The entry screen is very like the one above, but simpler. Use it in the same way.

continued...



**Step 3. Specify or edit the Lesson Times for each subject.**

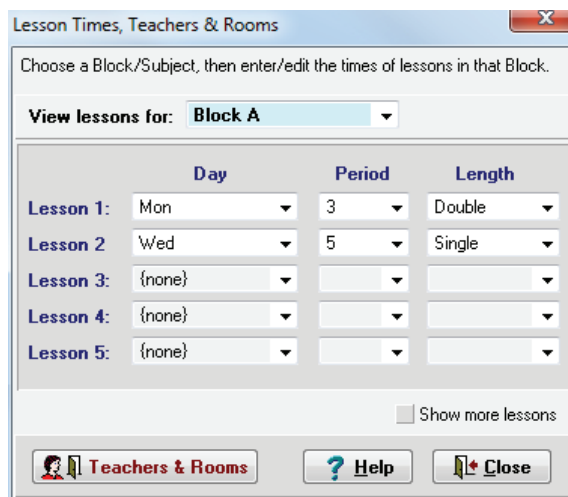
Move to the entry screen, either


- via the **Overview Screen** <F2>, click on item 7:  and then on Lessons & Times: 'Manually' and 'Enter Lesson Times',
- or on the **Lesson Times Menu**, choose: Lesson times & Teachers.

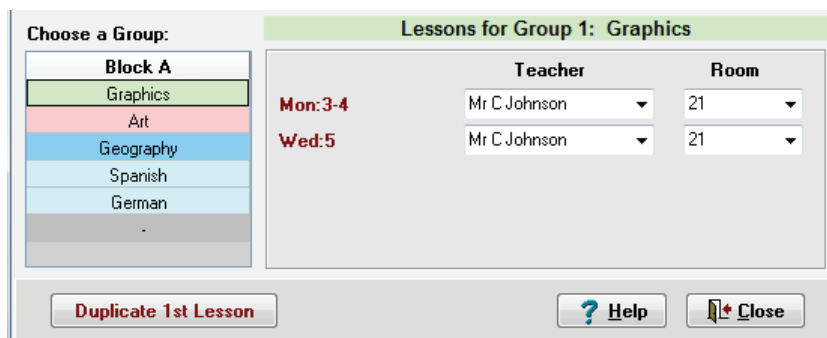
The 'drop-down' window at the top of this screen allows you to choose from:

- The Option Blocks A, B, C, etc that you decided upon in your chosen Pattern (as on pages 24-25), **or**
  - The Core Subjects that you entered in step 2 above (see page 45-46).
- a) Choose a Block or a Subject in this top window, and then click in some of the entry windows below to select the appropriate Day, Period and Lesson-length, using the data from your completed timetable.

If you have loaded the timetable data automatically from **TimeTabler**, then this screen already shows the results.



- b) When you have completed the Lesson Times for a Subject, click on  **Teachers & Rooms** to get this screen:




In the left-hand column, click on each Group in turn, and then enter or edit:

- The Teacher. Once you have entered a teacher's name, it will appear on the drop-down list.
- The Room name/number.



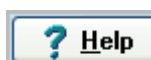
# Individual Student Timetables

Move to the Printout Screen, either

- via the **Overview Screen** <F2>, click on item 7:  then Students' Timetables:
- or on the **Print** Menu, choose: Students' Timetables



This screen works in a very similar way to the printout screens in *TimeTabler*. Click on the **Help** button for more details of each part of the screen.



You can go back and modify anything manually (pages 45-47), if the details are not correct. Remember: untick the **Test page only:** ☒ when you are ready to print out more than 1 sheet.

The lessons are colour-coded: 'Option Block' lessons in blue, 'Setted' lessons in maroon, and 'Class-taught' lessons in black.

You can switch colour printing on/off via PrintoutMenu->Publishing->Colour printing. This is useful if you want to photocopy black and white copies.

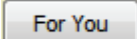
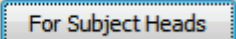
Click on **Advanced** for even more control over the appearance of the printout.

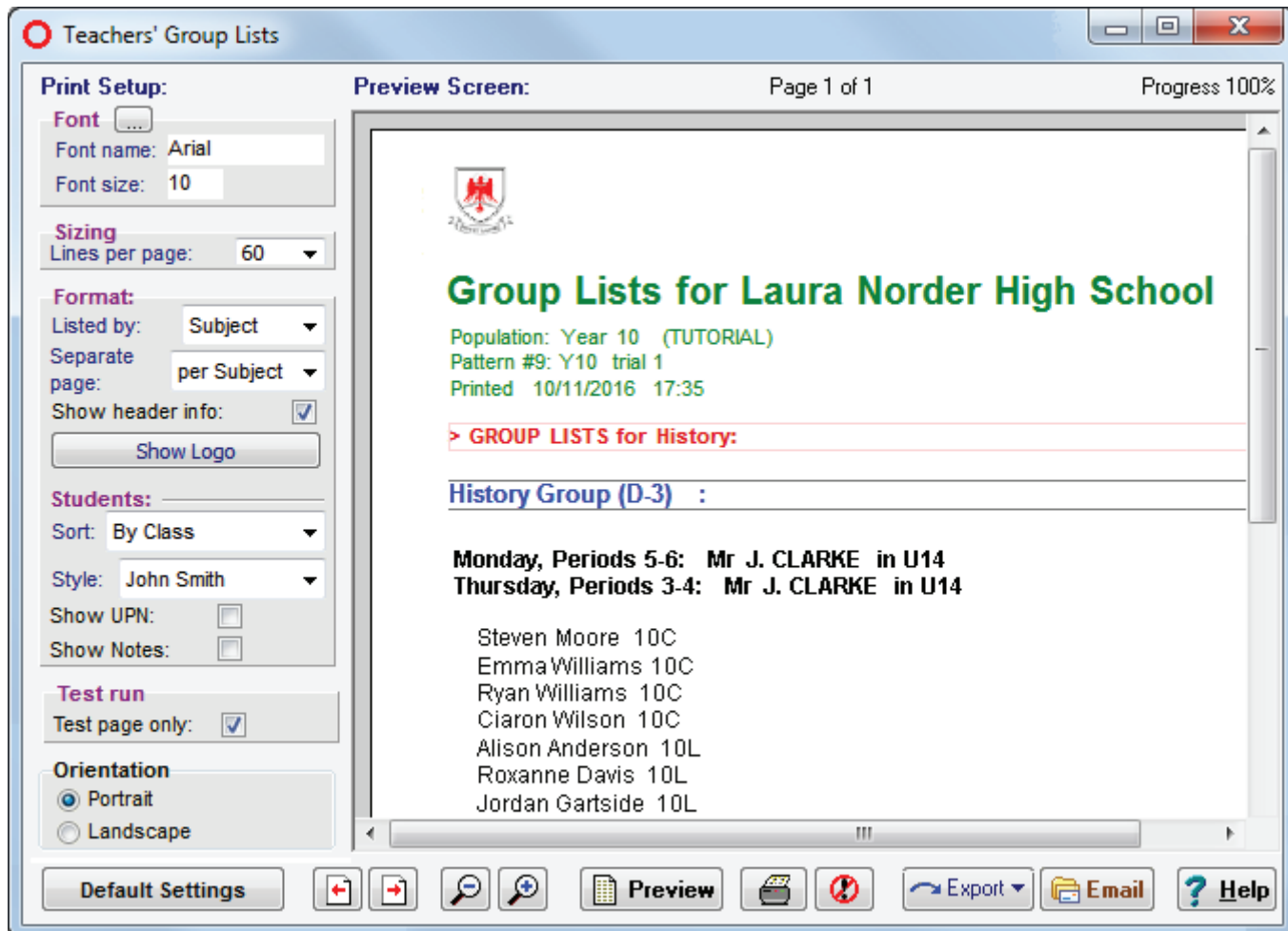
To save paper, you can print more than one grid per sheet. For example, to print 3 grids per sheet, placed so that they can be guillotined into 3 equal thirds, you can set the font = Arial 10pt or similar, set 'Students per page' = 3, then Advanced->'Vertical spacing between each student' = 7, and uncheck 'Show main title', then click Apply.

# Teachers' Group Lists

Move to the Printout Screen, either

- via the **Overview Screen** <F2>, click on item 7:  then Group Lists:
- or on the **Print**  **Menu**, choose: Group Lists 

You are offered the choice of:   depending on how you want the lists shown.



**Print Setup:**

Font: Arial, Font size: 10

Sizing: Lines per page: 60

Format: Listed by: Subject, Separate page: per Subject, Show header info: ☒

Students: Sort: By Class, Style: John Smith, Show UPN: ☐, Show Notes: ☐

Test run: Test page only: ☒

Orientation: ☒ Portrait, ☐ Landscape

**Preview Screen:** Page 1 of 1, Progress 100%

**Group Lists for Laura Norder High School**

Population: Year 10 (TUTORIAL)  
Pattern #9: Y10 trial 1  
Printed 10/11/2016 17:35

> **GROUP LISTS for History:**

**History Group (D-3) :**

**Monday, Periods 5-6: Mr J. CLARKE in U14**  
**Thursday, Periods 3-4: Mr J. CLARKE in U14**

Steven Moore 10C  
Emma Williams 10C  
Ryan Williams 10C  
Ciaran Wilson 10C  
Alison Anderson 10L  
Roxanne Davis 10L  
Jordan Gartside 10L


Buttons: Default Settings, Preview, Export, Email, Help

This screen works in a similar way to the screen on the opposite page, so that you can adjust the size of the font etc.

Click on the **Help** button for more details of each part of the screen.



As before, the title font and the left-hand margin width can be adjusted via PrintoutMenu->Publishing.

 allows you to add your school logo/badge to the printout.

These printouts are useful as Registration or Attendance Lists or Mark lists. Together with the Individual Student Timetables, they can ensure a neat and efficient start to the new term.



For the Exports see the next page.



For emailing the Group Lists to Heads of Subjects, for checking, see Appendix 2.






## 8 Exports

Export

You can choose from a variety of exports:






**Export your Options Data to ...** See also the "File" menu for more imports and exports.

**Your Options Data can be exported in various ways:**


<b>1) Export to T.O.O.L.S</b> Export to our online system for collecting students' choices:	 <b>TOOLS</b>
<b>2) Export a Report to Excel, HTML, etc</b> Select your report from this list, then click on Export:	(select your report) ▼
<b>3) Export to a Customized File</b> Choose your own format for an Export:	 Customized File
<b>4) Export for a Letter to Parents</b> Export a Mail Merge file that can be imported into Word:	 Mail Merge File
<b>5) Export to TimeTabler</b> Export your Current Pattern to TimeTabler:	 TimeTabler ▼
<b>6) Export to your MIS</b> Export your Options data to your MIS or Admin System:	 MIS / Admin System ▼

1. For the **TOOLS** export see the PDF of the TOOLS documentation, at <http://www.timetabler.com/PDFs/TOOLS-Manual.pdf>

2. The second item allows you to choose from a list:

 Pattern Design  
 Student Choices  
 Student Allocations  
 Group Lists  
 Subject Lists

and export it as:

 Export ▼


to HTML  
to Excel (XLS)  
to Excel (CSV)  
to Text  
to Word (DOC)

3. The third item allows the export of a variety of data, in .txt or .csv format. Most of the items are on the other menus on this page.

4. For details of the Mail Merge **Letter to Parents**, see Appendix 3.

5. Export to **TimeTabler**

You can export a completed **Options** Pattern into an activity-batch in **TimeTabler**. When you have the exported file from the menu above, in **TimeTabler** go to File Menu ➡ Import from Options. This asks you which Batch you want to import the option Blocks into. Once the Blocks have been imported you can 'tweak' the blocks in the usual ways, on the Curriculum Diagram Screen.

**4) Export to TimeTabler**  
Export your Current Pattern to TimeTabler:  TimeTabler ▼

6. Export to your **MIS**


Some MIS (eg. SIMS, iSAMS) allow you to import all the data for your complete **Options** Pattern, with the allocations for each student. This will save you a lot of time!

Clicking on the button shows a list of MIS that support this feature at present.

If your MIS isn't on the list then please ask the supplier to implement an import (we can provide them with test files and full file-documentation).

Select your MIS on the list, and click on the 'Read the documentation' button to get full details.

See also page 54.


**6) Export to your MIS**  
Export your Options data to your MIS or Admin System:  MIS / Admin System ▼

**Link to SIMS**


You can transfer information between **Options** and your MIS. The usual steps are as follows:

- 1) At the start of the process, **import** your Students (and optionally their Choices) into **Options**
- 2) Do your work in **Options**, to find the best pattern for your students' choices
- 3) **Export** a list of the students in each Group (and perhaps the Pattern itself) from **Options** to your MIS.

Import from MIS | **Export to MIS**

 **Export the Group Populations (students in each Teaching Group) to your MIS:**  
You can export the Pattern and the Students in each Group to SIMS, by clicking below:

[Read the Documentation](#) [Export now ➡](#)

 Close

## Appendix 1 Using the Student Inspector : Counselling

This screen can be reached via **Review & Counsel** or via **Student Inspector** on the Current Pattern Screen. It is very useful if, after deciding on the Pattern that you are going to implement, some (few) students don't fit that Pattern, or else they've changed their mind, or perhaps they are new entrants to the school.

With this screen you can easily discuss the possible solutions and counsel the student.

Then you can apply any changes quickly, by using drag-and-drop.

In this example, Nina Shaw chose French as her 4th Choice, but that doesn't fit the Pattern.

**Student Inspector**

**Choose a Student to Inspect:**

	ch1	ch2	ch3	ch4
Booth, J	PE	IT	Dr	Fr
	9L F	D-1	C-1	B-3
Dixon, D	Gg	Fo	De	
	9L M	D-4	C-3	A-5
May, N	Fo	PE	Gg	DeSL
	9L F	C-3	D-1	A-3
Shaw, N	Te	PE	IT	Fr
	9C F	B-2	D-1	C-1
Wild, J	Fr	Gg	PE	Gra
	9C M	B-5	A-3	D-1

**Nina Shaw** [View Requests](#)

Nina **can't** do all her choices - if you would like to change one of her choices,

**Auto** **Remove** **Choices: (3/4)**

	ch1	ch2	ch3	*ch4*
Te	PE	IT	Fr	
Materials Tech	P.E.	Info Technolog	French	

	Block A	Block B	Block C	Block D
1	Gra 16	IT 26	IT 23	PE 17
2	ArtSL 26	Te 16	Fo 20	ArtSL 10
3	Gg 16	Dr 13	Fo 20	Hi 16
4	Sp 18	Fr 24	Mu 18	Gg 16
5	DeSL 23	Fr 20	CD HL 19	Fr 17
6				IT 25
	= 99	= 99	= 100	= 101

At the left-hand side you can see her Choices, in order. NP=Not Placed (French). These Choices are repeated at the upper part of the right-hand side. Red indicates French is not placed. In the Pattern of Blocks, the purple header shows that she has no subject in Block A, while the 3 bright-yellow cells indicate the 3 Choices that she has got, in Blocks B, C, D. The red French cells show where she could take French, if she changed her Choices. If the student has made (1 or 2) Reserve Choices, it is shown at the top-right-hand side of the screen.

You can counsel Nina Shaw to :

- *Either* abandon French and choose a subject from Block A. You can double-click on any group to show her who is in each group and where her friends are. If she chooses a new subject you can just **drag** that new subject to her Choices using your mouse. *For example*, just drag Graphics (Gra) from Block A to Choice 4 (Fr) at the top-right, **or vice-versa**.
- *Or* she can keep French and change one of her other Choices. Again you can just **drag** the Subject label with your mouse to make the change. *For example*, if she chooses to study Graphics (Gra) in Block A, and abandon Technology (Te), then drag Gra from Block A to Choice 1 (Te), or **vice-versa**. Or, to see the moves better, undo the Te allocation by dragging Te from Block B back to Choice 1 (Te).

In doing this, the program checks against any **Rules** that you have specified, and tells you of clashes.

To Review or Edit the current Rules, or to suspend them, click on : [Review Rules \(2\)](#)

To check how well your Students have followed the Rules, click on : [Rules Check](#)

The list down the left-hand side initially shows all the students in this Population, but you can select sub-sets by using the drop-down list:

Students with **red** problems (like Nina Shaw) are those that have not yet got all their Choices in this Pattern. Students with **blue** problems (like David Dixon, above) are those that have not yet made all their Choices.

View: [All students](#) [All students](#) [Red or Blue Problems](#) [Red Problems \(only\)](#)

Hover your mouse over any student to see any Notes & Comments entered for this student.

If the student is looking at the screen with you, and the notes are confidential, then un-tick here:

To prevent the student seeing other people's choices, use: [Hide/Show](#)

☒ Show Notes

[Review Changes](#) Click this button to see a Report of the Changes you have made during this session.

Save or Discard your changes: When you Close, you are always shown the effect of your changes in the Current Pattern screen. When you Close that screen, you are asked if you wish to Save your changes.

## Appendix 2      Emailing Group Lists to Heads of Subjects

When you have finished developing a suitable Pattern, you may wish to give the resulting Group Lists to Heads of Department (HoDs), for their information and/or their approval, as follows:

### A.

At Print ➡ Group Lists (page 49) you are offered a choice of:


For You

For Subject Heads

**For You** gives you the Group Lists arranged by Block (as before). ie. the Group Lists for each of the groups in Block A, followed by the Groups in Block B, etc.

This is probably the best format for you to use to do any checking, but not the best format for a HoD who may have to check several groups for his/her subject.

**For Subject Heads** gives you the Group Lists arranged by Subject. ie. all the groups for the first Subject, then all the groups for the second Subject, etc. See below for how to email these lists to HoDs.

For each of these choices you can use the  button to export individual files, ie. for individual Blocks or for individual Subjects.

The files are Excel files, which can be easily emailed to colleagues (but see below). Each file-path includes Labels & the Date, for example C:\OPTwin\Group\_Lists\2016\BySubject\Oct19\_13.09

### B.

You can (optionally) enter details of your Heads of Department (Heads of Subject) in order to automate and simplify the distribution of the Group Lists.

You can access this entry screen at any of 4 places:

- Basic Data ➡ Heads of Department
- Subjects ➡ HoDs
- Print ➡ Group Lists ➡ For Subject Heads, then select Email ➡ Setup ➡ HoD email addresses
- Customize Menu ➡ Email ➡ Setup

This screen allows you to enter a formal name, a familiar name and one or more email addresses (use a semi-colon separator).



The formal name of the HoD will now appear at the top of the relevant printed Group List.

If the same person covers several subjects, then enter the data once and then click the 'Copy' button and choose another Subject s/he is head of.

On this same screen use ☒ Copy any emails to me at:  to get a copy yourself, for your records.

### C. Emailing Group Lists to HoDs (and other colleagues)



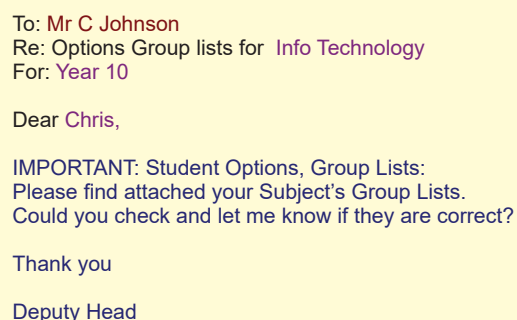
On the Group Lists Screen (page 49), as well as **printing** the students in each group as in A above, you can also easily **email** them to the HoD for each Subject (for the HoD to check and return).

The email message to HoDs will look like this:

The top 4 items in the email are taken automatically from other parts of **Options** (including part B above).

The default email message (shown here) can be changed at Customize Menu ➡ Email ➡ Setup ➡ Customize email text.

Once the details have been set up (in B above) this should save your admin time.



To: Mr C Johnson  
Re: Options Group lists for Info Technology  
For: Year 10

Dear Chris,

**IMPORTANT:** Student Options, Group Lists:  
Please find attached your Subject's Group Lists.  
Could you check and let me know if they are correct?

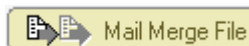
Thank you

Deputy Head

**Note:** To email lists to Heads of Subject of which students have chosen each subject, see page 18.



## Appendix 3 Mail Merge letters



You can send customized 'Mail Merge' letters to Students and their Parents, so that they know what Choices they have finally been given.

In outline, **Options** ➡ **Export** ➡ **Mail Merge File** will export data for PLACEHOLDERS (see below) for you to place in a letter that you type in Microsoft Word (or other word-processing software).

For example, if a letter is written with the following «PLACEHOLDERS» inserted within Word:

To : the Parent or Guardian of «FORENAME» «SURNAME» Form: «CLASS»

Dear Parent or Guardian,

Options Choices

«FORENAME» has made the following choices:

	Choice	Placed ?	in Block
1.	«CHOICE1»	«PLACED1»	«INBLOCK1»
2.	«CHOICE2»	«PLACED2»	«INBLOCK2»
3.	«CHOICE3»	«PLACED3»	«INBLOCK3»

If «FORENAME» wishes to change any of «HISHER» choices at this stage, then please note that «HESHE» can only move to a subject in the **same block** as «HISHER» existing choice, and only if spaces are available:

Block «BLABEL1»	Block «BLABEL2»	Block «BLABEL3»
«GROUP1-1»	«GROUP2-1»	«GROUP3-1»
«GROUP1-2»	«GROUP2-2»	«GROUP3-1»
«GROUP1-3»	«GROUP2-2»	«GROUP3-1»

Then it will be printed out as:

To : the Parent or Guardian of David Walker Form: 9A

Dear Parent or Guardian,

Options Choices


David has made the following choices:

	Choice	Placed ?	in Block
1.	French	Yes	B
2.	Art	Yes	A
3.	Drama	Yes	C

If David wishes to change any of his choices at this stage, then please note that he can only move to a subject in the **same block** as his existing choice, and only if spaces are available:

Block A	Block B	Block C
History	French	Geography
Art	ICT	Drama
Music	PE	Spanish

For more details, including an example and full details of all the «PLACEHOLDERS» that you can use,


- Click on  then on the Index tab at the top, and type 'Mail merge' to find 2 Help pages.

- See the Help files for Word or your word-processing software.

- For a longer article that gives you more details, click on

[Support Centre](#)

and then type 'mail merge' in the Search Box:

 MailMerge



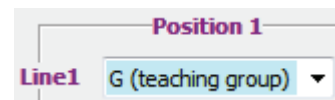
## Appendix 4 Teaching Group Names (TGNs)

You can (optionally) use TGNs in 3 ways:

### 1. On Printouts

If your colleagues will recognise a TGN code and if you think they would find it helpful for identifying groups, you can include TGNs on the following printouts:

- Group List printouts: – the TGN appears in blue, in the Group title.
- Student timetables: – click on the Advanced button and you can choose “G (Teaching Group)” as one of your fields, as shown here:
- Pattern Design: – you can choose Show Subject abbrev / full name or TG name.
- Student Choices: – you can choose Show Block-Group-No. or TG name.
- Student Allocations: – you can choose Show Subject abbrev / full name or TG name.



### 2. For exporting the Students' Final Choices to some MIS

This can save a huge amount of time, where such an export exists.

For example, to iSAMS, or to Bromcom. (The export to SIMS uses a different method, without TGNs.)

For details see the relevant documentation for each MIS in the KnowledgeBase in the Support Centre.

### 3. For exporting the TGNs to *TimeTabler* (or you can enter TGNs directly, within *TimeTabler*).

The export file produced via Export 5. Export to TimeTabler Export current pattern to TimeTabler includes the TGNs so that *TimeTabler* can import them if you wish.

## Entering TGNs

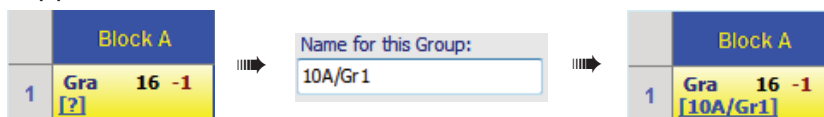
There are 2 ways of entering TG Names into *Options*:

### A. Manually

On the Current Pattern Screen (page 25), click on Display Teaching Group Names (TGNs). In each cell of the Pattern a blue ?-mark appears.

Click on a ?-mark and enter the TGN for that group.

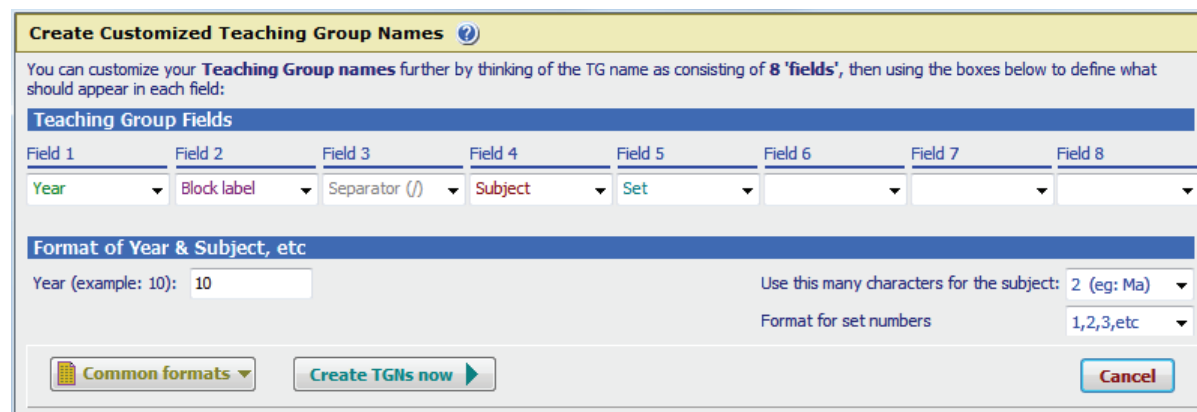
For example, 10A/Gr1 for this group:



### B. Automatically

On the Current Pattern Screen (page 25), click on Assign Automatic TGNs, and then select the format you want. Then click **Create TGNs now**.

You can specify the exact format by selecting from the drop-down lists on this screen:



You may need to experiment to get the best TGN format.

## Appendix 5 TOOLS used by a Guidance Counsellor

Many schools, particularly in Scotland, counsel the pupils as they are making their Choices. In this scenario, a Guidance Counsellor or Pupil Support Teacher meets with the pupil, in school, and they discuss the Choices (and the Level of study) and enter the Choices together.

Because the TOOLS system is multi-user, more than one session can take place at the same time. Users report that a YearGroup of 200 pupils can be dealt with during one day.

The advantages include:

- No typing (and possible mis-keying) by Office Staff is needed, a big saving of time.
- Less paper, and less chance of paper being mislaid between home and school.
- Details of the Choices are emailed to the Parents, and any requests for review are emailed back.
- The UserName and PIN do not need to be sent home.
- Live data is available for the Senior Management Team to monitor. They can see early if a subject is very popular or unpopular. They can see which pupils (eg. school refusers) need to be chased.

After importing the data into **Options**, the Review & Counsel Screen can be used (see Appendix 1), and of course all the other features of **Options**, including Amalgamate (page 57) if you run bi-Level courses.

## Appendix 6 Using the Shuffle button



The Shuffle Screen allows you to change the size of a group (while allowing the students to keep the same subject choices). See also Worked Example Q13 on page 33.

**Shuffle**

Shuffle 'Fr' students (there are 4 groups of 'Fr' in your pattern)

**Group A-7:** Next group >

- Nellist, N (9K) F
- 1 Ogden, W (9L) M: Fr(A)->Fr(C)
- 3 Park, N (9K) F: Fr(A)->Fr(C)->IT(D)->Gg(A)
- 2 Shaw, L (9J) F: Fr(A)->Fr(C)->Art(A)
- 4 Walsh, C (9K) F: Fr(A)->Fr(C)->Fo(B)->IT(D)->Gg(A)

**Group C-3:** Next group >

- Fletcher, G (9L) M
- Howarth, L (9C) F
- 2 Johnson, C (9L) M: Fr(C)->Fr(A)->Art(C)

In the examples shown above, to shuffle French students currently in Block A:

- Nina Nellist, in 9K, is grey. She cannot be moved, her subject Choices do not allow it.

1 Wayne Ogden, is green, meaning that he can move in a 1-step move to Block C, without affecting any other Block.

2 Lauren Shaw, is purple, meaning that she can move to other groups (French in Block C, Art in A) in 2 steps.

3 Nicola Park is in blue, meaning she can be moved by a 3-step shuffle, involving blocks A, C, D. If you select her then drag her across (or click on the blue arrow, or double-click on her name) you are shown more details of the move, as shown here: It shows the 'Before' situation and it shows the 'After' assignments if you choose to click on Apply.

4 Chris Walsh is in orange, meaning that this shuffle would be a 4-step move, as shown in orange above.

Apply this Shuffle ?

The 3-step Shuffle for **Nicola Park** looks like this:

Block:	A	B	C	D
Subject:	Gg	Fo	Fr	IT
Before:	D-4	B-2	A-7	C-1
	↓		↓	↓
After:	A-4	B-2	C-3	D-5
New size:	10	19	8	23

[Change to Choice order](#)

Apply Cancel

Small groups are tinted green; big groups are in pink

## Appendix 7 Rules for checking students' Choices

Please see page 19 for an introduction to this topic.

Most of the first 11 Rules are self-explanatory and clear from the title of the Rule.

The Rules check that your students have followed whatever restrictions you have placed on their Choices.

This page (below) gives more information about the last 2 of those 13 Rules.

These Rules are useful if you have specific requirements for students following certain courses.

For example, for **EBacc**, at least one Humanities subject, at least one MFL (as well as Ma, En, Science).

For example, for **IB**, one choice from each of the 6 subject areas.

### Rule 12 : Choose from Defined Sections

Rule
Choose from Defined Sections

In this Rule you can specify Subjects grouped in each Block / Column, eg. to match what you set up in TOOLS.

For example, this school (for **EBacc**) is specifying that the students

- MUST choose Geography or History, and
- MUST choose German or French or Spanish.

Any student not obeying these rules will be flagged up.

('Section' is used here because that is the word used in TOOLS.)

For **IB**, you'd have 6 columns here to mirror the 6 subject areas.

This Rule would then check that your students have chosen validly.

(If you use TOOLS to collect the students Choices then you'd set up the same sections in TOOLS.)

	Humanities	MFL	Section 3	Section 4
ON/off:	ON	ON	off	off
Art				
CD				
De		Y		
Dr				
Fr		Y		
Fo				
Gg	Y			
Gra				
Hi	Y			
IT				
Mu				
PE				
Sp		Y		
Te				
Total:	2	3	0	0

### Rule 13 : Choose number of Subjects from each Faculty

Rule
Choose number of subjects from each Faculty

If you place your subjects in 'Faculty groupings' (not necessarily real faculties) on the Subjects Screen (by choosing the same Faculty colour/number for them), then you may find this Rule useful.

The screenshot shows the possible rule for each 'Faculty'.


This Rule could be used for **EBacc**, and for **IB**.

Click below to change how many Subjects must be chosen from each Faculty:

Faculty:	Choices:	Subjects include:
Faculty 1	1	Art-Art
Faculty 2	2	Gg-Geography
Faculty 3	1 or 2	De-German
Faculty 4	(any)	Fo-Food Technology
Faculty 5	0	-
Faculty 6	1	-
Faculty 7	2	-
Faculty 8	0 or 1	-
Faculty 9	0, 1 or 2	-
	1 or 2	-
	at least 1	-

## Appendix 8 Checking Students' Levels

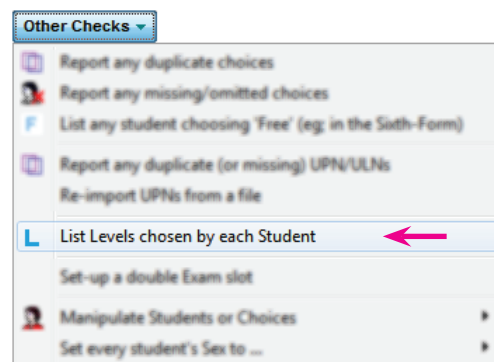
For example, you might be running the IB Diploma Programme and want to check that each student has chosen the correct number of subjects at 'HL' (higher level) and at 'SL' (standard level). The total of 6 subjects (+core) is usually 3 'SL' subjects + 3 'HL' subjects, or it may be 2 'SL' + 4 'HL'.

If you have 'Levels' turned on (on the Subjects Screen):  you can now run a report to see what Levels each student has chosen.

To do this, go to:  
Students & Choices Screen  Other Checks  List Levels:

It creates an Excel file for you, so you can check:

	A	B	C	D	E	F	G	H
1	Student Level Choices for Laura Norder High School							
2	16/11/2018							
3								
4	The following Levels have been chosen by each Student:							
5								
6	Student	Class	Choices made	No level	SL	HL		
7	Farzana Afzal	12A	6	0	3	3		
8	Wasif Ali	12A	6	0	3	3		
9	Sameena Sabir	12A	6	0	2	4		
10	Roheen Shepherd	12A	6	0	3	3		



This shows results for a school with IB Levels (at SL and HL), but it can also be used for Levels in S3456 in Scotland.

## Appendix 9 Amalgamating Subjects (eg. for bi-Level groups)

You can 'amalgamate' (combine) specific subject choices, if it becomes necessary.

**Example 1 :** An IB Diploma school may need to amalgamate SL and HL History into 1 group for **Options**.

**Example 2 :** A 6th Form College may wish to merge 2 similar (but uneconomical) courses.

**Example 3 :** A Scottish school might offer History at National N4 level and at National N5 level.


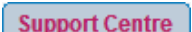
Each History pupil chooses one or the other, and the intention was to have separate groups. However, later, due to pupil group numbers (or staffing problems) you decide that History N4 & N5 must be taught as a single group.

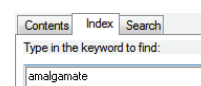
There are 2 possibilities:

**A** Amalgamating students' Choices **before** you build a Pattern (the better way),

**B** Amalgamating Groups **after** you have built a Pattern.

To see how to use either of these two features, see:

- A Help Screen, via:  and then enter **amalgamate** into the Index search box:
- The KnowledgeBase in the , enter **amalgamate** into the Search box.



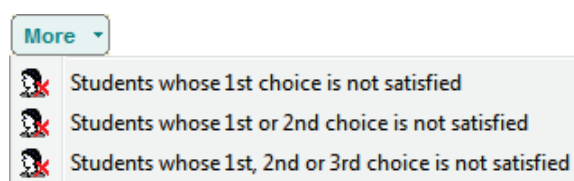
## Appendix 10 Priority of Choices

For some schools, the student choices are in no particular order, or at least choice 4 is no less important than choice 1. But for other schools, choice 1 does mean more than choices 2, 3 or 4.

For example, the students may have been asked to put their most treasured choice first, or else because it is for EBacc and the first 2 choices have to be one Humanity and one Language, whereas choices 3 & 4 are more open/free-choice.

On the main Current Pattern Screen, you can click on the **More** button to choose (for example) 'Students whose 1st or 2nd choice is not satisfied'.

Then you'll be shown only those students who have either not had their 1st choice satisfied/assigned to the pattern, or have not had their 2nd choice assigned, (or both).



Then you can use other tools, for example the Review & Counsel Screen, to fix it.

## Appendix 11 Friendships & Disruptive Relationships

To help with friendships, and perhaps with bullying, you can say that two students would like to be (or should not be) in the same Group. (ie. you can try to link together, or try to separate, students.)  
Used carefully, this can make a big difference to classroom atmosphere.

To do this, go to: Current Pattern ➡ Student Requests (or go to Pattern Design ➡ Student Requests).  
To add a Request, click on New, then complete the details of your request:

Student Requests

The following requests are available:

Request:	Meaning:
Same Group (for student A)	Student A would like student B to be in the same Group. <i>For example, If 'A' is taking 'Geog' and 'B' is also taking 'Geog', then it is important to student A that they are in the same Group.</i>
Same Group (for student B)	Same as above, but now it's important for B.
Same Group (mutual)	Same as above, but a mutual need.
Different Groups	Students A & B should be kept apart, if that is possible (eg. if there are 2 or more 'Geog' groups). You do not want A and B to be in the same group, for any subject. Eg. because they can be a bad influence on each other / disruptive.

The first three are very similar and the difference is only for the benefit of the **Options** User, eg. a Counsellor using the Student Inspector Screen when reviewing any problems.

Click on 'Check & Report' – and you will be shown (for example):

	A	B	C	D	E	F
1	Check Student Requests for Laura Norder High School					
2	10/11/2018		The following Requests required checking:			
3						
4	No	Student 'A'	Student 'B'	Request	Notes	Success?
6	1	Kirsty Moss	Melanie Owen	Same Group (mutual)	Art: A and B are both in Group A-2	Yes
7	2	Kirsty Moss	Melanie Owen	Same Group (mutual)	Fr: A and B are both in Group B-5	Yes
8	3	Daniel Johnson	Paul Hurst	Different Groups	Gg: A and B are both in Group D-4	No: review
9	4	Daniel Johnson	Paul Hurst	Different Groups	Art: A and B are both in Group A-2	No: review
10						
11	Total Choices checked: 32					
12	Requests checked: 4					
13	Possible problems: 2					

This shows that Kirsty Moss and Melanie Owen are in the same groups for Art and for French, as requested. But Daniel Johnson and Paul Hurst (who evidently don't work well together) are both in the same groups for Geography & Art. To change these assignments you can try using either the **Shuffle Screen** or the **Student Inspector Screen**. In this example, because there are 2 Art groups and 2 Geography groups, paired-up in the same 2 columns (see page 33), a simple swap solved both problems, like this:

8	3	Daniel Johnson	Paul Hurst	Different Groups	Gg: A is in Group A-3 and B is in D-4	Yes
9	4	Daniel Johnson	Paul Hurst	Different Groups	Art: A is in Group D-2 and B is in A-2	Yes

Clearly this is only possible in cases where the arrangement of subject groups allows it.



## Appendix 12 Gender balancing

If you have 2 groups of the same subject, you may not want one to be mostly Girls and the other mostly Boys. To help with this, on the main Current Pattern Screen select: Style Highlight Gender-bias (2:1).

Any group in which there are 2 or more Girls for each Boy\*\*, will turn pink ... and any group in which there are 2 or more Boys for each Girl\*\*, will turn green. More balanced groups will turn white.

(\*\*but only if the group is large enough with at least 3 members of the dominant sex).

There is also a 'Highlight Gender-bias (3:1)' option – this highlights groups where the ratio of one sex to the other is 3:1 or higher.

You can then use the Shuffle Screen to move some Girls or Boys around.

Alternatively, on the Current Pattern Screen, select any group, click **More** Equalise by Gender Girls, or Boys. It shows you a list of students who can be swapped, and then makes the swaps for you.

Style ▾

☒ Show Boys/Girls
 ☒ Highlight Gender-biased groups (2:1)
 ☐ Highlight Gender-biased groups (3:1)

## Appendix 13 Gender Monitoring

There are occasions when you may need to monitor your Option groups for a gender bias. For example, if you want to encourage more girls into Computer Science.

There are several ways in which you can monitor possible gender-bias in specific subject choices. They are all intended to be 'light-touch' / gentle reminders, and do not change the way that **Options** chooses your pattern or assigns students to it.

To turn on the monitoring, go to: Customize Menu Record Sex/Gender and click 'Monitor Gender Bias':  
Or go to: Basic Data Menu Check for Gender Bias:

Tick 'Monitor' to turn-on the feature, and then click on the subjects shown, to choose which subject(s) to monitor (eg. Computer Science):

Gender Bias

Do you wish to monitor possible gender-bias in certain subjects ? ☒ Monitor

Click the subjects you wish to monitor:
 

Select All

Select None

Art	CD	CSt	De
Dr	Fo	Fr	Gg
Gra	Hi	IT	Mu

Bias report ▾

Compare with last year

Clash Table

You can then choose to view 3 different Reports : 

Bias report ▾

Compare with last year

Clash Table

For full details click on a **Help** button, and enter 'Gender monitoring' into the Search Box of the Index tab.

Contents Index Search

Type in the keyword to find:

Gender monitoring

?

Help

## Appendix 14 Roam button

When working on your Current Pattern (page 25), you may wish to know what would happen if you moved a Group from one Block/ Column to another?

With the Group highlighted, when the **Roam** button is pressed, you are shown a Report:

This allows you to see whether it would be better if the highlighted Group was moved to another Block.

For more details click on a Help button, and enter 'Roam' into the Search Box of the Index tab.

Contents Index Search

Type in the keyword to find:

Roam

Roaming Report

Who would easily fit into this 'Sp' group if it roamed to another Block ? :

	Ch	A*	B	C	D
Students fitted:	18	7	5	15	
Afzal, F	4	Y	N	N	N
Barnes, N	1	Y	Y	Y	Y
Burrows, L	1	Y	Y	Y	Y
Conran, K	3	Y	Y	N	Y
Fletcher, G	3	Y	N	Y	N
Healey, S	3	Y	B	O	Y
Hudson, S	3	Y	N	N	Y
Jenkins, N	4	Y	N	N	Y
Lock, C	1	Y	Y	Y	Y



## Appendix 15 Feasibility Report



The pattern you create in **Options**, has (in the end) to fit on the timetable against blocks in other years. *For example*, if you are creating a pattern for Year 12 in **Options**, it has to fit against the existing (effectively already fixed) Year 13 pattern.

The Feasibility Screen should help you to see whether a particular pattern suggested by **Options**, is likely to work for you when you get to the timetabling stage. In the example below we compare a new (being developed) Pattern for Year 10, with an existing Pattern for Year 11.

First, if the existing Year 11 Pattern does not exist in your Pattern Library, then enter a mock-up of it by going to: Design a Pattern ► New (enter a Name) ► View Pattern ► Enter a copy of the existing Year 11 Pattern. Click 'Close' and 'Yes' to Save it (without allocating any students).

Go to Design a Pattern ► Feasibility to see a screen with these headers:

Feasibility Report This allows you to check how easily 2 patterns might co-exist on the timetable.		
<b>Step 1: Set Subject Limits</b> 	<b>Step 2: Choose Patterns to compare</b> Fixed: Year 11 Final (10/1/19) Variable: Year10 trial 8 (10/11/19)	<b>Step 3: Run Report</b> 

Step 1: Click on the 'Set Subject Limits' button and for each Subject, enter the maximum number of Teachers/Resources that are available to teach at the same time.  
*For example*, if you have 2 Music Teachers you might enter 2. But if you have only one Music Room (or one of the teachers is Part-time) then you might enter 1.

Step 2: Choose the 2 Patterns you wish to compare:

Step 2: Choose Patterns to compare	
Fixed:	Year 11 Final (10/1/19)
Variable:	Year10 trial 8 (10/11/19)

Step 3: Then click on to see a Clash Table:

Feasibility Clash Table				
Variable Pattern	Fixed Pattern			
	A	B	C	D
	Gra , Art Art , Fr Gg , Gg De , IT Sp , Dr	**Gra,**Gra Art , Hi Gg , IT De , Te Sp , Gg	Gra , CD Art , **Sp Gg , Art De , Fr **Sp , IT - , Hi	Gra , Fo Art , Fo Gg , **Sp **De , **De **Sp , Mu
	IT , Art Te , **Fr **Dr , Gg **Fr , IT **Fr , **Dr	IT , Gra Te , Hi Dr , IT Fr , Te Fr , Gg	IT , CD Te , Sp Dr , Art **Fr , **Fr **Fr , IT - , Hi	IT , Fo Te , Fo Dr , Sp Fr , De Fr , Mu
	IT , Art Fo , Fr Fo , Gg Mu , IT CD , Dr	IT , Gra Fo , Hi Fo , IT Mu , Te CD , Gg	IT , **CD Fo , Sp Fo , Art Mu , Fr **CD , IT - , Hi	IT , **Fo **Fo , **Fo **Fo , Sp **Mu , De CD , **Mu
	PE , Art Art , Fr Hi , Gg Gg , IT Fr , Dr IT , -	PE , Gra Art , Hi Hi , IT Gg , Te Fr , Gg IT , -	PE , CD Art , Sp Hi , Art Gg , IT Fr , IT IT , Hi	PE , Fo Art , Fo Hi , Sp Gg , De Fr , Mu IT , -

It shows you whether the Yr 10 blocks will fit against the Yr 11 blocks. The colours mean:  
 Green no problem with these blocks co-existing  
 Yellow 1 problem, marked with \*\*  
 Orange, Red, Pink 2, 3, 4 or more problems.

At the right-hand side the Top 10 Permutations are listed for you:

Obviously the ideal is to have more than one 'zero-clash' permutation.

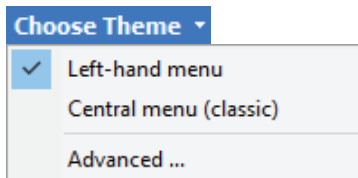
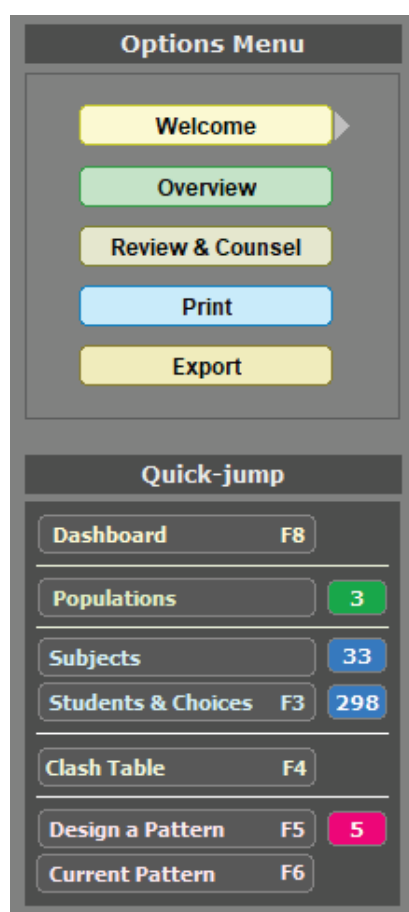
Top 10 Permutations					
Fixed:	A	B	C	D	Tot
Var-1	A	C	D	B	
	0	0	0	0	0
Var-2	A	C	B	D	
	0	0	1	0	1
Var-3	C	A	B	D	
	0	1	1	0	2
Var-4	D	C	A	B	

At the bottom you have a choice of other displays: View: ☒ Show all groups ☐ Show number of problems ☐ Suggestion-1 ☐ Suggestion-2

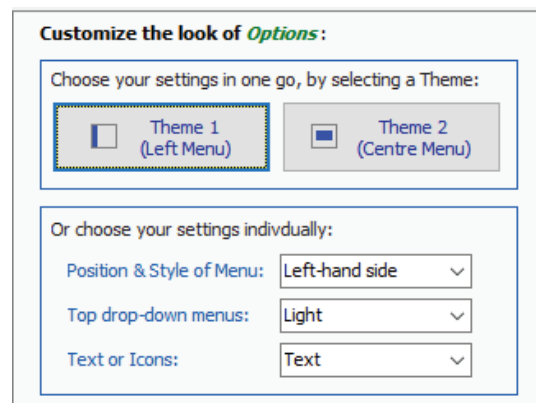
Taken together these analyses should help you to anticipate potential timetabling problems. Note however that this analysis does not take into account Container Blocks, Bands, Part-timers and other Staff Unavailability, variations in period-breakdown, the effect of other years, day structure, etc.

## Appendix 16 Themes & Dashboard

As well as the 'Classic' (pictorial) Theme shown in this Handbook, there is also another Theme that you can choose, at the bottom left of the opening screen:



Clicking on Advanced gives you some further options:



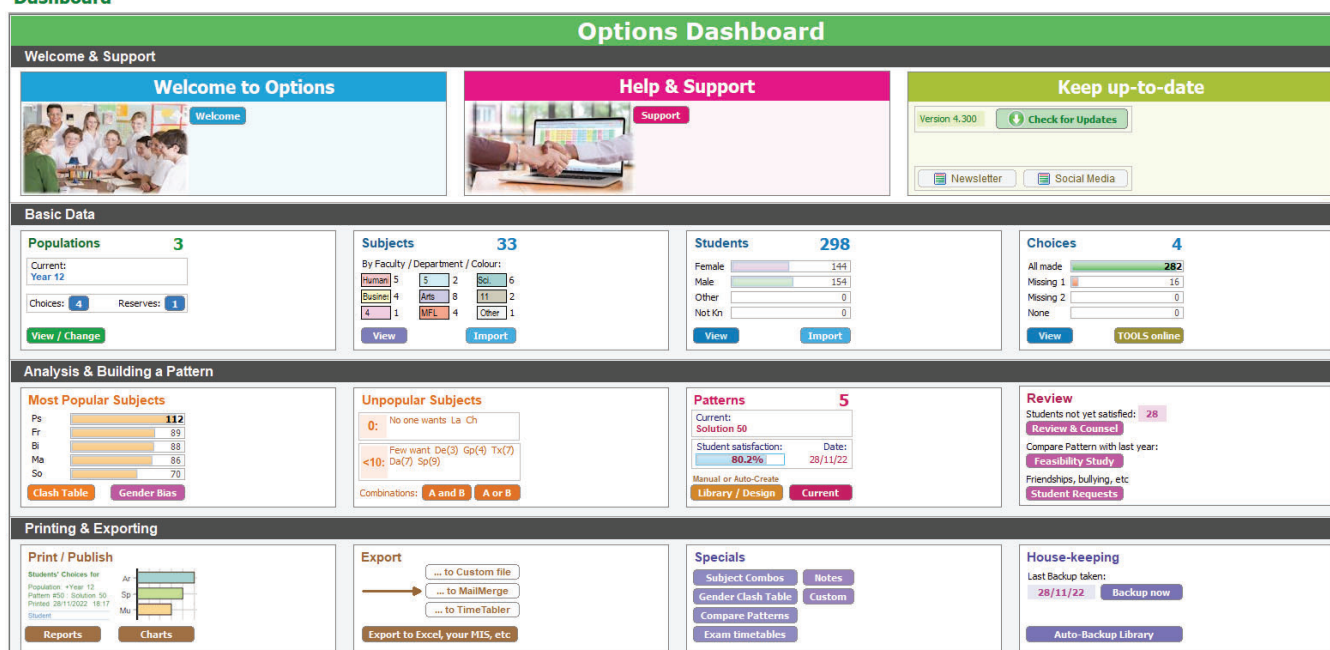
The drop-down menus at the top of your screen can have a light or a dark background.

And labels on the **Options** 'switchboard' can be icons (as before) or they can be text.

You can play around until you find the look you prefer.

In both Themes there is a '**Dashboard**', that summarises all your key information on one screen:

### Dashboard



Most of the items are clickable and will take you straight to that named feature.

## Appendix 17      AutoCreate : Fix

### Fix a solution during AutoCreate

Solution 2

Fix

If a particular solution during AutoCreate catches your eye, you can now review it more closely, while AutoCreate continues to work.

To do this, click **Fix** in the header of the solution you wish to Fix, and that solution is preserved / protected as long as you wish.

By default, if **Options** finds a new solution that has a better satisfaction than an existing one, it replaces the least-good current solution with the new one. However this can be inconvenient if you especially wanted to save / work on the one that has been replaced (*for example*, sometimes you may know that a particular solution fits your school better, even if it has a lower satisfaction ... and you can later use 'Improve' to improve it, or otherwise work on it).



So you can **Fix** a solution: click on the Fix button and that solution is not over-written / replaced, even if it is the lowest satisfaction solution and a better one is found; instead the 'second-worst' solution is over-written.

In addition, if the solution is only partly visible, scrollbars appear, so you can scroll around in the pattern to learn more about it.

Recent Patterns are shown explicitly at the bottom of the opening screen of **Options**, to remind you:

To view one, or work on it, just click on it.

#### Recently viewed Patterns:

 <b>Solution 45</b> 9/11/23 95.0%	 <b>Solution 57</b> 12/11/23 95.9%
---	---

## Appendix 18      Using Dropbox, Microsoft OneDrive, GoogleDrive, etc.

An increasing number of schools are using Dropbox etc to store their **Options** (and **TimeTabler**) data, (in addition to the common Backing-up of their data on these devices).

The program detects if your data appears to be on one of these platforms, and if it is, it presents you with this warning on the opening screen:

**Note: you appear to be using Dropbox - this requires special handling so please click to see our article**

Clicking on the message opens the relevant KnowledgeBase article in your browser.

## Appendix 19      Devising an Examination timetable

You can find the most efficient (simplest) structure very quickly by using the data already in your **Options** program.

For details of how to do this, visit the KnowledgeBase via:

 [Support Centre](#)

and enter:   then choose item 4.

## Notes:

### Other programs and information

**Options** is part of a suite of programs, with **TimeTabler** (the core program) and **StaffCover**.

You can download free Tutorial versions of **TimeTabler** and **StaffCover** from our web-site at:  
<https://www.timetabler.com>

You can also download from this web-site **free** INSET training packs on aspects of timetabling.

**To see the enormous amount of Help & Support that is included free with the programs, see:**  
[www.timetabler.com/SupportCentre/Help-and-Support-Booklet.pdf](http://www.timetabler.com/SupportCentre/Help-and-Support-Booklet.pdf)

And there are more **free** booklets on aspects of timetabling at: [www.timetabler.com/timetabling-ebooks/](http://www.timetabler.com/timetabling-ebooks/)

For a fuller discussion of some of the issues in sorting out **Options** Patterns see:

Chapter 3 in Keith Johnson's book: Timetabling : A Timetabler's CookBook (ISBN 978-0-9561161-0-9)  
It is published by October ReSolutions Ltd.

There are more details of the book's contents, with Sample chapters to read, on the **TimeTabler** web-site at: [www.timetabler.com/book](http://www.timetabler.com/book)

See also the White Paper at: [www.timetabler.com/PDFs/WhitePaper-on-Options-&-TOOLS.pdf](http://www.timetabler.com/PDFs/WhitePaper-on-Options-&-TOOLS.pdf)  
and the White Paper at: [www.timetabler.com/PDFs/WhitePaper-SavingMoney.pdf](http://www.timetabler.com/PDFs/WhitePaper-SavingMoney.pdf)

If you are working in Scotland, see: [www.timetabler.com/scotland](http://www.timetabler.com/scotland)  
and: [www.timetabler.com/PDFs/WhitePaper-on-Options-&-TOOLS-in-Scotland.pdf](http://www.timetabler.com/PDFs/WhitePaper-on-Options-&-TOOLS-in-Scotland.pdf)  
and: [www.timetabler.com/SupportCentre/Scotland-Using-Options.pdf](http://www.timetabler.com/SupportCentre/Scotland-Using-Options.pdf)



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