

# Creating an Options Solution

## The Options Process

For schools working towards next year's timetable, a number of steps must be carried out before using Options:

- Create a dataset in Nova-T6 for next year and use Transfer Curriculum to carry the structures forward from this year to next.
- Create a new academic year in SIMS.
- Check and amend the Pastoral Structure in SIMS for the new academic year.
- Run the Pastoral Promotion routine in SIMS.
- Ensure that the Nova Curriculum Plan contains sufficient base bands in the relevant year group.
- Send the curriculum and timetable from Nova to SQL using dates that define the working academic year.
- Change to the new academic year in SIMS and place the students in their 'correct' bands.

### Menu Systems

The Options software has two menu systems and both enable access to the same functionality. You can switch between menu systems at any time to suit your personal preference. This setting is saved on a per user basis, so changing the type of menu system displayed does not affect the display on other users' workstations.

For the purposes of this Quick Reference Sheet and the online Options help file, the **Focus** menu routes are referenced.

### Setting up a New Implementation in Options

In order to use Options, ensure that you have been assigned to the Timetabler and the Curriculum Manager groups in System Manager.

**IMPORTANT NOTE:** Any backed up implementations created in previous versions of Options that you might wish to reference, should be recovered from backup prior to upgrading to Options version 5.70. If this is not done, old implementations cannot be used with 5.70.

1. In SIMS, select **Focus | Options** to display the **Options Security** dialog.
2. Select **Manager** as the user. The password should be left blank when you first access Options (if required, set a password by selecting **System | Passwords**).
3. Click the **OK** button.
4. Create a new implementation by selecting **Tools | Implementation Manager** to display the **Implementation Manager** dialog.
5. Click the **Create New** button to display the **New Implementation Details** dialog.
6. Enter the path for the **SIMS .net Directory** or click the **Field Browser** button and navigate to the required location. This path should be the same as the SQL link path set up for Nova-T6.
7. Click the **OK** button to display the **Create New Implementation** dialog.

8. On the **Basic** tab, enter a **Description** to identify the new implementation.

Normally, the **Effective Date** must match the start date of the student memberships of base bands in Year 10 and should be the first day of the working academic year. The **Membership End Date** should be the last day of the working academic year.

9. Click the **OK** button then click the **Yes** button to save the details.

10. Highlight the new implementation and click the **Select** button.

Once a new dataset has been created in Nova-T6, a new or existing implementation has been activated and the students and subjects have been imported into Options, you are ready to begin the main Options processes:

- Enter and analyse student choices
- Create classes and blocks either manually or automatically
- Place classes into blocks to build the curriculum structure
- Allocate students to classes either manually or automatically
- Edit the block structure and re-allocate students, where necessary.

### Choice Allocation Parameters and the Allocation Mode

All of the available Options courses can be linked to an alternative choice that can be used as a 'substitute' for a student's original choice, if they cannot be given their first choice. Extra courses can be entered as reserves, so that a reserve choice could be substituted for a main choice. Options attempts to use the reserve in place of a low priority choice to reduce disappointment.

From the **Solution Editor** page, select **Solution | Set Auto-allocation parameters** to display the **Choice Allocation Parameters** dialog.

Alternatively, double-click the **Allocation Mode** indicator on the **Solution Editor** page.

The parameters selected determine how the allocations are made.

1. Specify the allocation parameters that you want Options to work within by selecting the appropriate radio button.
2. Select the **Allow alternate choices** check box to enable alternative choices, if required.
3. Click the **OK** button.

The **Allocation Mode** indicator on the **Solution Editor** page reflects the choices made on the **Choice Allocation Parameters** dialog.

{0} - Ignore reserves

{1} - Use first reserve only

{\*} - Allow all reserves

{A} - Allow alternate choices.

Allocation Mode: {0A}

### Explanation of Sub-Divisions

It is possible to divide a course into sub-divisions. Every student who chooses this course can then be assigned to one of its sub-divisions, and each class serving the course is restricted to a range of sub-divisions. A maximum of nine sub-divisions can be created for any one course.

Once classes have been created, a range of sub-divisions can be allocated and only students with the appropriate values have the potential to be placed into these groups, e.g. a class with a sub-division range 1-2 accepts students with sub-divisions 1 or 2 only. Students can be placed into sets by ability in this way. An alternative use of sub-divisions would be to enable single-sex teaching groups.

If you elected to use sub-divisions in your implementation (by entering **Y** in the **Use sub-divisions (Y/N)** field on the **Create New Implementation** dialog), the **SDiv** column is displayed on the **Blocks** columns on the **Solution Editor** page.

# Creating an Options Solution

## Creating an Options Solution using the Solution Editor Page

You can create and view all the allocations, class memberships, blocks and course information from the **Solutions Editor** page. You can also clearly examine how the student choices have been allocated and resolve any failures. When you save an Options solution on the **Solution Editor** page, any changes made to the allocations are disseminated throughout other functional areas in Options. The existing menu routes can still be used to carry out the Options allocations, if preferred. The original functionality in Options remains unchanged.

Click the **Solution Editor** button from the Focus menu to display the **Solution Editor** page.



Solution Editor button

### Blocks Filter

Select **Show all** or **Filter by Course** from the **Blocks** drop-down list and then select the appropriate course name from the **Course** drop-down list.

### Allocation Mode Indicator

This identifies how the allocations are made.

Classes can be dragged and dropped from one block to another to find the best fit. Unpin the **Block** columns to maximise the space on the screen by selecting **Solution | Unpin Blocks**.

### Classes Filter

Select **Show All**, **Unallocated Only** or **Multiple Units Only** from the **Classes** drop-down list to check that all classes have been allocated to blocks.

Right-click a **Class** to **Clone it**, **Remove from Block** or to **Test** its position in the **Blocks** columns.

### Class Details Panel

Click any class name in the **Classes** list to view the details of all the students who have been allocated to that class in the **Class Details** panel.

### Students Filter

Select **Show All**, **Partial Fits Only** or **Filter by Course** from the drop-down list to view the status of the students in the list.

Right-click a student's name in the **Students** list and select **Remove from All Classes**, if required. Select **Allocate** to re-assign them to different classes.

In the **Student Details** panel, drag an options choice that has not yet been allocated to a class and drop it onto an appropriate class in the **Block** column.

The **Class Details** and course name are displayed, together with the number of **Boys**, **Girls** and the **Total** number of students allocated. The **Range** field displays the minimum and maximum class sizes specified for this class.

### Student Details Panel

Highlight a student's name in the **Students** list to display their Options allocations in the **Student Details** panel.

The Application Bar on the **Solution Editor** page consists of a number of activity buttons that enable some of the most commonly used Options functionality to be run from this page.

### Generating Classes from Choices

Once students' choices have been analysed, the required classes can be created. Click this button to populate the **Classes** list.



Generating Classes from Choices button

### Allocating Classes to Blocks

Options automatically allocates classes into a block formation that minimises the number of student choice clashes. However, this process does not actually place the students into the classes.

Each class must be allocated to a block before students can be allocated to it. This is an automated process, that deals only with classes intended to serve a single block. Classes can also be assigned manually to blocks.



Allocating Classes to Blocks button

### Allocating Students to Classes

Students are allocated to classes based on their main, reserve and alternative choices. Any existing locked student allocations are not moved by this process. Options considers the allocations based on the **Auto Allocation Parameters** that have been previously specified.

Where sub-divisions are in use in the implementation, these are also considered and a student cannot be allocated automatically to a class that does not support the appropriate sub-division.



Allocating Students to Classes button

### Clearing Allocations

Allocations can be cleared from both classes and blocks, enabling you to re-allocate students as many times as you wish.



Clear Allocations button

### Taking a Snapshot of the Current Data

A single snapshot can be taken of a set of choices or a solution that has been created so that you can experiment further, then return the data to its original state. If you want to return to a previously saved snapshot, click the **Return to snapshot** button.



Take snapshot of current data button



Return to snapshot Button

It is possible to experiment with the allocation of classes to blocks, and with the allocation of students to classes, until you are satisfied that the best possible choices have been made for as many students as possible.

Once the data has been exported to Nova-T6 and SIMS, the subsequent solution you create provides the actual class memberships for the beginning of the next academic year.

This guide is based on the version of the software (5.70) in use at the time of publication.

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# SIMS