numax StudentInformation

## Assigning Lockers to Students Procedural Checklist

| Change Log |  |  |
| :--- | :--- | :--- |
| Date | Section Number/Name | Change Description |
|  |  |  |
|  |  |  |
| $4 / 23 / 20$ | Entire document | Review and update |

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## Task \＃1：Create Rooms／Locations

Navigation：StudentInformation－Management－School Administration－ School Building Administration－Rooms／Locations

Create Room／Locations to be referenced when creating new lockers．An example of using this information for assigning lockers could be to assign the special needs students near the classroom where they are most frequently located．

| Room／Location Maintenance |  |  |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Add Location |  |  |  |  |  |  |  |  |  |
|  |  | Code | Name－ | Description | Location Type | Capacity | Schedulable | Homeroom | Active |
| 㗂 | d | C110 | Art | Art，Painting，Ceramics | Art Room | 20 | $\checkmark$ | $\checkmark$ | $\bigcirc$ |
| 面 | － | C128 | AVID I \＆ 11 | AVID | Regular Classroom | 25 | $\checkmark$ | $\checkmark$ | － |
| 㗂 | － | BUS | Bus | Bus－Transportation | Bus | 50 | $\square$ | $\square$ | － |
| 䙻 | d | C122 | Business | Business Law，Marketing，Accounting，Media Communications | Regular Classroom | 25 | $\checkmark$ | $\checkmark$ | $\bigcirc$ |
| 眔 | d | CAFE | Cafeteria |  | Cafeteria | 200 | $\checkmark$ | $\checkmark$ | － |
| 囬 | － | Clin | Clinic | Clinic | Clinic | 50 | $\square$ | $\square$ | － |
| 眇 | d | C109 | English | English，Spanish IV，AP Spanish | Regular Classroom | 25 | $\checkmark$ | $\checkmark$ | $\bigcirc$ |

## Task \＃2：Create Locker Size Codes

Navigation：StudentInformation－Management－School Administration－ School Building Administration－Locker Administration－Locker Size Codes

Create／Edit Locker Size codes to be used when creating new lockers．


## Task \＃3：Create Lockers

Navigation：StudentInformation－Management－School Administration－ School Building Administration－Locker Administration－Locker Maintenance

Create／Edit lockers and their characteristics．Lockers are school－year specific， and may have different combination series，locations，sizes，capacities，and grades assigned in each school year without affecting other school years．

| Locker Maintenance |  |  |  |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| From this screen，you can display，add，change and delete data pertaining to lockers． Clicking a locker number shows the students assigned to the locker． |  |  |  |  |  |  |  |  |  |  |
| Add Locke |  | Filter：Active |  | （ Academic Only |  |  | Size | Combination Series | Reference Location | Grade |
|  |  | Locker Number $\boldsymbol{\sim}$ | Status | Description | Capacity | Residents |  |  |  |  |
| 而 | 0 | 001 | Active | 500E5697，E－2 | 1 | 0 |  | 2 |  | 09 |
| 而 | 0 | 002 | Active | 500E5698，B－9 | 1 | 0 |  | 1 |  | 09 |
| 而 | 0 | 003 | Active | 500E5699，E－5 | 1 | 1 |  | 2 |  | 09 |
| 而 | 0 | 004 | Active | 500E5700，A－1 | 1 | 0 |  | 5 |  | 09 |
| 囬 | 0 | 005 | Active | 500E5701，C－9 | 1 | 1 |  | 5 |  | 09 |

Click the edit pencil icon to change an existing locker．

```
Locker Maintenance
From this screen, you can display, add, change and delete data pertaining to lockers.
Clicking a locker number shows the students assigned to the locker.
llor
Capacity:
Size:
Current Series: 2-23-09-45 v
Reference Location
Grade: \
```

Click the Add Locker button to add a new locker．


To assign a Locker Combination to a locker，you must select an existing Locker Combination Series from the Current Series drop－down．If there are none in the drop－down，or you want to add another Locker Combination，then you will need to select a Combination Series，enter the Combination and then click Add Combination．Once you have done this，you can select that Combination Series from the Current Series drop－down．

| Series：Combination： |  |  | Add Combination |
| :---: | :---: | :---: | :---: |
| 6 V |  |  |  |
|  | Series | Combination |  |
| 自 | 1 | 31－17－03 |  |
| 而 | 2 | 23－09－45 |  |
| 自 | 3 | 16－02－38 |  |
| 自 | 4 | 11－47－33 |  |
| 自 | 5 | 05－41－27 |  |

NOTE：The Locker Number field is an alpha－numeric field．The Locker Number column on the Locker Maintenance page is sorted numerically，however，Locker Location Assignment is done according to alpha characters．
Recommendation：Use leading zeros on locker numbers．

Task \#4: Assign Locker Locations
Navigation: StudentInformation - Management - School Administration School Building Administration - Locker Administration - Locker Location Assignment

Assign a range of lockers to a specific location within a school. This sets the lockers' Reference Location.

| Locker Location Assignment |
| :--- |
| From this screen, you can assign lockers to specific locations within the school |
| (i) In order to view the current lockers by location or assign lockers to a location, you must first select a location from the dropdown. |
| In addition, you must specify whether you are working with academic lockers. |
| Filter By Location: -- Select a Location -- Academic Lockers |

## Locker Location Assignment

From this screen, you can assign lockers to specific locations within the school


|  | Starting Locker $\boldsymbol{A}$ | Ending Locker | Available Lockers | Capacity |
| :--- | :---: | :---: | :---: | :---: |
| 而 | 100 | 120 | 21 | 21 |

Physical Total
Capacity Capacity
21
21

Starting Locker: * $\square$

Ending Locker:
Add Range

## Task \#5: Assign Locker Grade Levels

Navigation: StudentInformation - Management - School Administration School Building Administration - Locker Administration - Locker Grade Level Assignment

Assign a range of lockers to a specific grade level within a school.
Locker Grade Level Assignment
From this screen, you can assign grade levels to lockers within the school
(in In order to view the current lockers by grade level or assign lockers to a grade level, you must first select a grade level from the dropdown.
In addition, you must specify whether you are working with academic lockers.
Filter By Grade Level: - Select a Grade Level - - Academic Lockers


During Locker Location Assignment and Locker Grade Level Assignment, if you do not specify an Ending Locker, the location you specify will be assigned all lockers from the specified Starting Locker to the last locker listed.

Locker Location Assignment is done according to alpha characters.
Recommendation: Use leading zeros on locker numbers.

## Task \#6: Bulk Locker Assignment

## Navigation: StudentInformation - Management - Ad-Hoc Updates - Locker Bulk Assignment

Student lockers can be assigned to a group of students selected by one of three different methods: Select Students By Search Criteria, Student IDs, or Ad-Hoc Membership. Unless otherwise noted, see the Student Lockers Guide for details.

NOTE: All students must have a locker designated as their Primary Locker in order for the locker number to print on reports or schedules.

## Students Tab - Search Criteria

When searching for students by Search Criteria, select Student Status and Grade Level for all students being assigned lockers. Other options on the Search Criteria screen include searching by Last Name or First Name (with wildcards if you select the checkbox next to those fields), Homeroom Assignment, Gender, Program, or Team. You can also combine those search criteria as needed to select specific a group of students.


## Students Tab - Student IDs

When searching for students by Student ID, enter all Student IDs to be included in the bulk assignment. You must use commas between ID numbers when listing more than one Student ID number.


## Students Tab - Search by Ad-Hoc Membership

When searching for students by Ad-Hoc Membership, you must select a single Ad-Hoc Membership group from the dropdown box. You can select an Ad-Hoc Membership from the pull-down menu and select Next, or you can select the ellipse button next to the Ad-Hoc Membership name to be taken to the Ad-Hoc Membership screen, where you can see and edit the individual students in that Ad-Hoc Membership. (This screen is located at StudentInformation - My Account - Ad-Hoc Memberships, and more details can be found in the Getting Started Guide.)
If you went to the Ad-Hoc Memberships screen, once you locate and confirm the Ad-Hoc Membership to use, click on the green arrow icon to select that membership and return to the Locker Bulk Assignment screen.


Once you have selected your students through one of these methods, select Next to proceed to the Assignment Method tab.

## Assignment Method Tab

Once you have your selected group of students, you can assign lockers to them by one of five different methods: Grade Level, Homeroom, Class Period,
Alphabetical order, and Random assignment. You can also Clear some or all locker assignments (clearing selections will be covered below).

```
Locker Bulk Assignment
Here you can assign a bulk group of students to lockers
Students Assignment Method Options Confirmation Results
Assignment Method:\bigcirc Grade Level Homeroom Class Period Alphabetical Random Clear
(3) This assignment method will assign lockers to students by selecting ascending lockers for students based on the students grade level. The application will attempt to assign all students to lockers configured for the students'
grade levels.
(3) In some situations, there won't be enough lockers defined for a grade level and some students won't get a locker assigned to them. If desired, these students can be assigned a locker at random by selecting to "Assign
Remaining Students at Random". This option will result in more complete assignment of lockers.
Assign Remaining Students at Random:[
Cancel < Back Next >
```


## Grade Level Assignment option:

To assign lockers by grade level, just select Grade Level and select Next to proceed to the Options tab.

## Homeroom Assignment option:

To assign lockers by individual homerooms, select Homeroom and then select the Homeroom Term for which lockers are being assigned. Students will be assigned lockers from those lockers assigned to their homeroom location. Select Next to proceed to the Options tab.

## Class Period Assignment option:

To assign lockers by a particular class period, select Class Period, use the calendar to choose a Calendar Date, and from the Period of the Day dropdown, select a class period on that date. Students will be assigned lockers from those lockers assigned to their classroom location at that period. Select Next to proceed to the Options tab.

## Alphabetical Assignment option:

To assign lockers alphabetically, select Alphabetical. This option assigns students to lockers in alphabetical order by student last name, in ascending order of lockers, without regard for grade or location. Select Next to proceed to the Options tab.

## Random Assignment option:

To assign lockers randomly, select Random. This option randomly assigns students to lockers without regard for grade or location. Select Next to proceed to the Options tab.

## Options Tab

There are four options. If you retain locker assignments, or if you some students are keeping previous locker assignments, select Students without a primary locker assignment or Students without any locker assignments from the Students to Include section. You can also select types of Lockers to Include, to Create Assignments as primary or secondary, and how you wish Existing Locker Assignments to be treated. When all options are set as desired, select Next to proceed to the Confirmation tab.

```
Locker Bulk Assignment
Here you can assign a bulk group of students to lockers
    Students Assignment Method Options Confirmation Results
Students to Include:
    0)Students without a primary locker assignment
    Students without any locker assignments
```

```Students with number of assignments fewer than: 2 \(\square\)
All Students (no limit on number of locker assignments)
Lockers to Include:
- Academic lockers only
Non-Academic lockers only
```

```Both academic and non-academic lockers
Create Assignments as:
- Primary locker assignments
Secondary locker assignments
Existing Locker Assignments:
- Remove primary assignments only
Remove all assignments
Keep assignments (update as secondary assignments if new assignments are primary)
```


## Cancel < Back <br> Next >

## Confirmation Tab

The screen will list the students by the method you selected on the Assignment Method tab. The accuracy of the locker assignment must be checked before the actual process is finished. If the number of students listed by grade level or location is equal to the number of intended locker assignments, click Finish to proceed to the Results tab. If the numbers are not reasonable, click Back to return to the Options tab or the Assignment Method tab and edit your selections. If your selections are correct and an error still exists, then the parameters and locker location assignments must be verified to see where the error lies. Selecting Cancel on the Confirmation screen completely exits Locker Bulk Assignment.

If you selected Grade Level Assignment, you can click on a blue Grade Level link to go to the Locker Grade Level Assignment screen for that grade level, completely exiting Locker Bulk Assignment.

| Locker Bulk Assignment <br> Here you can assign a bulk group of students to lockers |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Students | Assignment Method | Options Con | firmation Re | ults |  |  |  |
| Lockers Defined by Grade Level |  | Physical Lockers | Total Capacity | Existing Assignments | Remaining Capacity | Matching Students | Insufficiency |
| 09-09 |  | 568 | 568 | 386 | 182 | 0 |  |
| 10-10 |  | 61 | 61 | 53 | 8 | 0 |  |
| 12-12 |  | 1 | 1 | 0 | 1 | 1 |  |
| No Grade Level |  | 2 | 2 | 1 | 1 |  |  |
| All Students/Lockers |  | 632 | 632 | 440 | 192 | 1 |  |
| Cancel | < Back Finish |  |  |  |  |  |  |

If you selected Homeroom or Class Period Assignment, you can click on a blue link to go to the Locker Location Assignment screen for that assignment method. The Include statistics for locations with insufficient capacity only checkbox will hide all homerooms or classrooms that had enough lockers for the students with that location assigned.


If you selected Random or Alphabetical Assignment, the Confirmation tab will display simple text statistics for lockers assigned and insufficient.

| Locker Bulk Assignment <br> Here you can assign a bulk group of students to lockers |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Students | Assignme | ent Method | Options | Confirmation | Results |
| Physical Lockers: 632 <br> Total Capacity: 632 <br> Existing Assignments: 440 <br> Remaining Capacity: 192 <br> Students to be Assigned:1  <br> Insufficiency:  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| Cancel | < Back | Finish |  |  |  |

## Results Tab

The Results tab displays the students in your selected group of students, the lockers assigned to them, and lists the Action Taken with regards to that student and that locker. When clearing locker assignments, this will display a message informing you that those assignments have been removed.

The Results tab also contains a Start Over button. You can use this to assign lockers to a different group of students, or to clear some or all lockers and then reassign lockers.

NOTE: The Start Over button does not itself clear any locker assignments. To do this, you must select one of the Remove options under the Existing Locker Assignments area of the Options tab or proceed to the Clearing Locker Assignments section below.


## Task \#7: Clearing Locker Assignments

Navigation: StudentInformation - Management - Ad-Hoc Updates - Locker Bulk Assignment

You can clear assigned lockers by selecting a group of students, then selecting Clear on the Assignment Method tab.

## Students Tab:

Select a group of students and click Next.

## Assignment Method Tab:

Select Clear - This option clears current locker assignments.

## Options Tab:

Select types of Lockers to Include in the assignment removal, and how you wish to treat Existing Locker Assignments. Click Next.

## Confirmation Tab:

The screen will display simple text statistics for lockers cleared. If correct, click Finish. If incorrect, click Back to return to the Options tab or the Assignment Method tab and edit your selections.

## Results Tab:

The screen displays the students in your selected group of students, the lockers assigned to them, and lists the Action Taken with regards to that student and that locker. When clearing locker assignments, this will display a message informing you that those assignments have been removed.

# Task \#8: Single Locker Assignment during Registration 

## Navigation: StudentInformation - SIS - Registration Wizard

When a new student enrolls midyear, an individual locker must be assigned to that student. The student registration screen has a button entitled Assign Primary Locker, which activates the Locker Selection Wizard. The wizard shows a list of available lockers. By clicking on a locker number, that locker is assigned to the student being registered. You can also re-filter the lockers shown by Grade Level and by Location assigned.

NOTE: All students must have a locker designated as their Primary Locker in order for the locker number to print on reports or schedules.


| grade Level: -- Any Grade Level -.- |  |  | Location: -- Any Location - V |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Availability: |  |  | Auto Select $\square$ Filter |  |  |  |  |  |
| Locker Number | Grade Level | Location | Available | Residents | Capacity | Series | Combination |  |
| 001 | 09 |  | 1 | 0 | 1 | 2 | 23-09-45 | Change Series |
| 002 | 09 |  | 1 | 0 | 1 | 1 | 10-30-46 | Change Series |
| 004 | 09 |  | 1 | 0 | 1 | 5 | 46-08-36 | Change Series |
| 007 | 09 |  | 1 | 0 | 1 | 3 | 02-14-46 | Change Series |

## Task \#9: Single Locker Assignment on Edit Profile

Navigation: StudentInformation - SIS - Student - Edit Profile - Additional
Tab
You can also run the Locker Selection Wizard from the Assign Primary Locker button on the Edit Student Profile - Additional tab.

NOTE: Clicking on the Locker Assignments title on the Edit Student Profile Additional tab will take you to the Student Locker Assignment page (next task).


## Task \#10: Single Locker Assignment on Locker Assignment screen

Navigation: StudentInformation - SIS - Student - Locker Assignment

Use the Student Locker Assignment screen to add, edit or delete locker assignments for a specific student. You can also select View Free Lockers to go to the Free Lockers screen. The gold star icon shows the primary locker. A student must have a primary locker for the locker to be shown on the student's Schedule Card. A student should only have one primary locker, since a student with multiple primary lockers may have transcripts and report cards duplicated.


## Task \#11: View Free Lockers

## Navigation: StudentInformation - SIS - School - Free Lockers

Use the View Free Lockers screen to list lockers not assigned to students and to assign a specific locker to the selected student. A student must be selected to view Free Lockers.

|  |  |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| This screen displays the lockers in the school that are available to be assigned for the current school year. Clicking a locker number assigns the locker to the working student. |  |  |  |  |  |  |  |  |
| View Student Locker Assignments Academic Lockers |  |  |  |  |  |  |  |  |
| Locker Number $\boldsymbol{A}$ | Status | Description | Available Capacity | Residents | Capacity | Size | Reference Location | Grade |
| 001 | Active | 500E5697, E-2 | 1 | 0 | 1 |  |  | 09 |
| 002 | Active | 500E5698, B-9 | 1 | 0 | 1 |  |  | 09 |
| 004 | Active | 500E5700, A-1 | 1 | 0 | 1 |  |  | 09 |

## Task \＃12：View Locker Resident

Navigation：StudentInformation－Management－School Administration－ School Building Administration－Locker Administration－Locker Maintenance－Locker Residents

Student locker assignment can be accessed by going to the Locker Maintenance screen and clicking on individual locker numbers．A screen showing the locker resident will be visible．Clicking on the student＇s name will take you to that student＇s View Profile screen and make that student your actively selected student．

| Locker Maintenance <br> From this screen，you can display，add，change and delete data pertaining to lockers． Clicking a locker number shows the students assigned to the locker． |  |  |  |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Add Locker |  | Filter：Active v |  |  | Academic Only |  |  |  |  |  |
|  |  | Locker Number－ | Status | Description | Capacity | Residents | Size | Combination Series | Reference Location | Grade |
| 侖 | 0 | 001 | Active | 500E5697，E－2 | 1 | 0 |  | 2 |  | 09 |
| 侖 | 0 | 002 | Active | 500E5698，B－9 | 1 | 0 |  | 1 |  | 09 |
| 合 | 0 | 003 | Active | 500E5699，E－5 | 1 | 1 |  | 2 |  | 09 |
| 自 | 0 | 004 | Active | $500 \mathrm{E} 5700, \mathrm{~A}-1$ | 1 | 0 |  | 5 |  | 09 |

[^0]
## Task \#13: View Locker Assignment from View Profile

Navigation: StudentInformation - SIS - Student - View Profile - I want to...
From the student View Profile screen, you can also select View Lockers from the I want to... dropdown to see summary information about all lockers assigned to that student. The gold star notes which locker is assigned as that student's primary locker.


## Student Locker

This screen displays locker information for the student.

View Student Profile
Locker Number: 003
Combination: 07-39-21
Description: 500E5699, E-5
Academic Locker: $\mathbb{\boxtimes}$

## Task \#14: Run Student Locker Allocation Report (LOCK)

Navigation: StudentInformation - SIS - School - Student Reports Student Locker Allocation (LOCK)

Run the Student Locker Allocation (LOCK) report to view locker information and student allocations. The list will print both assigned and unassigned lockers.


[^0]:    Locker Resident
    This screen displays students assigned to a specific locker．
    Viewing students assigned to locker 633
    Student
    DAY，KEVIN

    Back to Locker

