

Assigning Lockers to Students Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
4/23/20	Entire document	Review and update

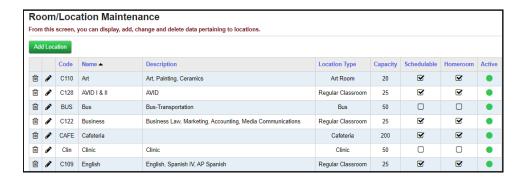
Table of Contents

Task #1: Create Rooms/Locations	2
Task #2: Create Locker Size Codes	
Task #3: Create Lockers	3
Task #4: Assign Locker Locations	5
Task #5: Assign Locker Grade Levels	6
Task #6: Bulk Locker Assignment	7
Task #7: Clearing Locker Assignments	13
Task #8: Single Locker Assignment during Registration	14
Task #9: Single Locker Assignment on Edit Profile	15
Task #10: Single Locker Assignment on Locker Assignment	16
Task #11: View Free Lockers	16
Task #12: View Locker Resident	17
Task #13: View Locker Assignment from View Profile	18
Task #14: Run Student Locker Allocation Report (LOCK)	18

Task #1: Create Rooms/Locations

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

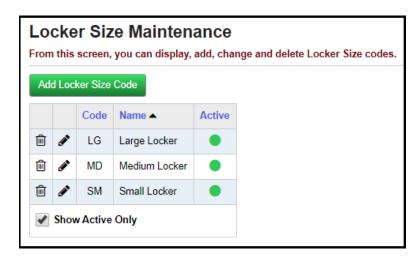
Create Room/Locations to be referenced when creating new lockers. An example of using this information for assigning lockers could be to assign the special needs students near the classroom where they are most frequently located.



Task #2: Create Locker Size Codes

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

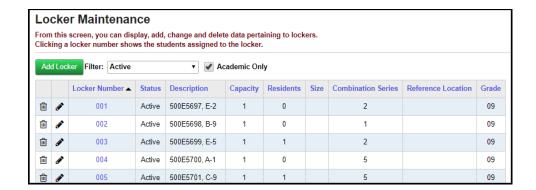
Create/Edit Locker Size codes to be used when creating new lockers.



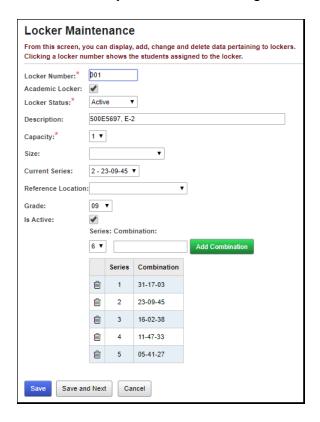
Task #3: Create Lockers

Navigation: StudentInformation – Management – School Administration – School Building Administration – Locker Administration – Locker **Maintenance**

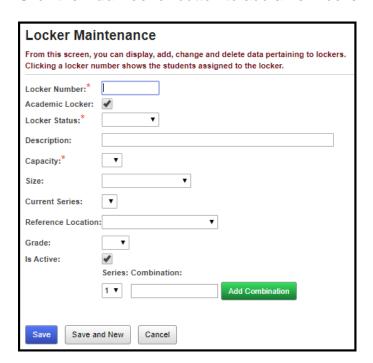
Create/Edit lockers and their characteristics. Lockers are school-year specific, and may have different combination series, locations, sizes, capacities, and grades assigned in each school year without affecting other school years.



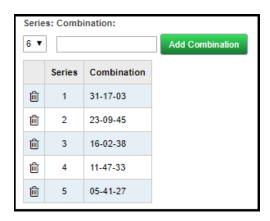
Click the **edit pencil** icon to change an existing locker.



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.



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.

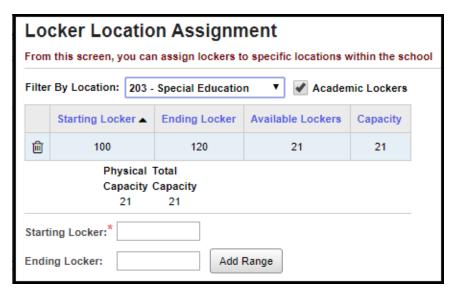
Recommendation: Use leading zeros on locker numbers.

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.



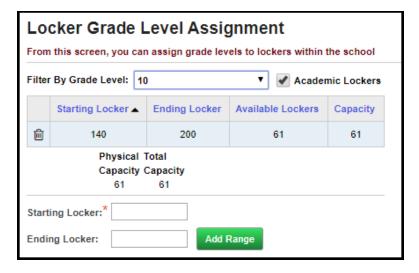


Task #5: Assign Locker Grade Levels

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.







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**

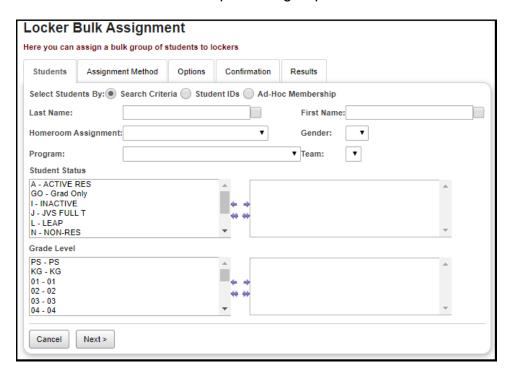
Student lockers can be assigned to a group of students selected by one of three different methods: Select Students By Search Criteria, Student IDs, or Ad-Hoc Membership. Unless otherwise noted, see the Student Lockers Guide for details.



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

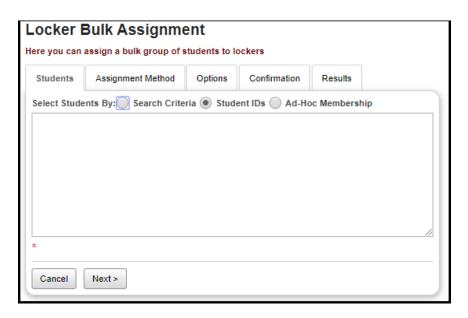
Students Tab - Search Criteria

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

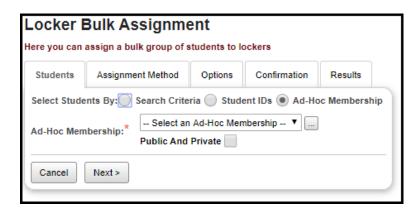
When searching for students by Student ID, enter all Student IDs to be included in the bulk assignment. You must use commas between ID numbers when listing more than one Student ID number.



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).



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:

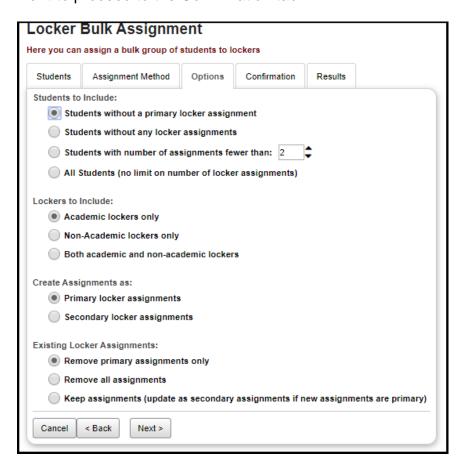
To assign lockers alphabetically, select **Alphabetical**. This option assigns students to lockers in alphabetical order by student last name, in ascending order of lockers, without regard for grade or location. Select Next to proceed to the Options tab.

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

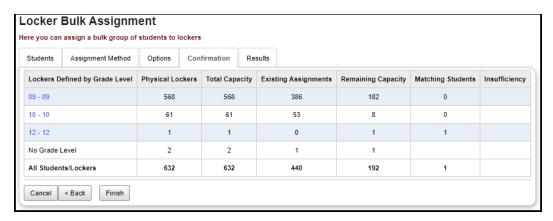
There are four options. If you retain locker assignments, or if you some students are keeping previous locker assignments, select Students without a primary locker assignment or Students without any locker assignments from the Students to Include section. You can also select types of Lockers to Include, 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.



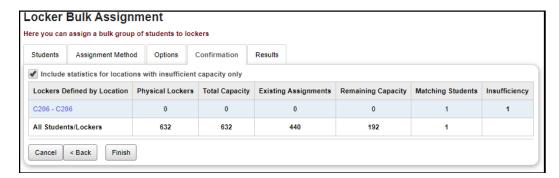
Confirmation Tab

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.

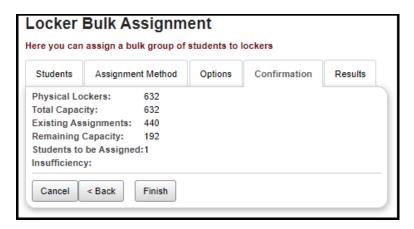
If you selected Grade Level Assignment, you can click on a blue Grade Level link to go to the Locker Grade Level Assignment screen for that grade level, completely exiting Locker Bulk Assignment.



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.



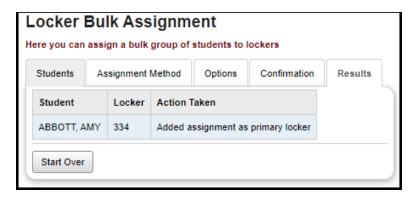
Results Tab

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.

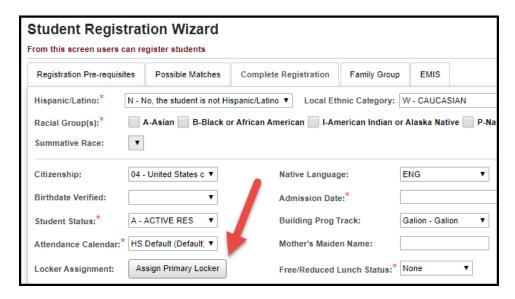
Task #8: Single Locker Assignment during Registration

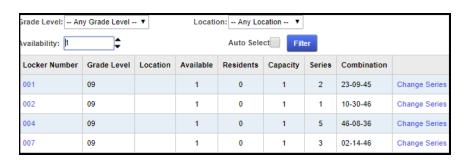
Navigation: StudentInformation – SIS – Registration Wizard

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.





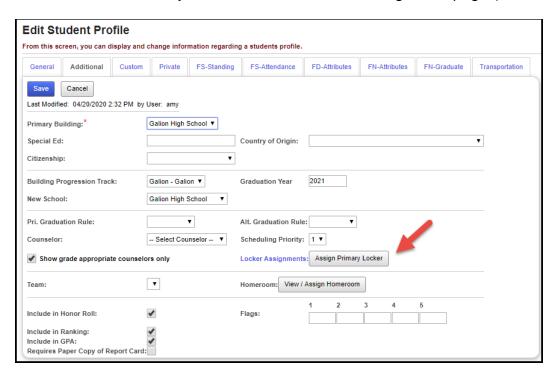
Task #9: Single Locker Assignment on Edit Profile

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.



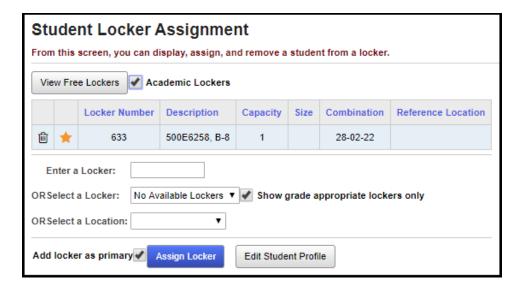
NOTE: Clicking on the Locker Assignments title on the Edit Student Profile – Additional tab will take you to the Student Locker Assignment page (next task).



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

Navigation: StudentInformation - SIS - Student - Locker Assignment

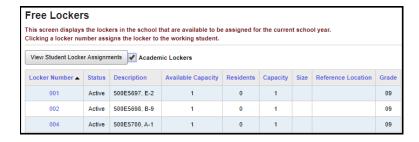
Use the **Student Locker Assignment** screen to add, edit or delete locker assignments for a specific student. You can also select View Free Lockers to go to the Free Lockers screen. The gold star icon shows the primary locker. A student must have a primary locker for the locker to be shown on the student's 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

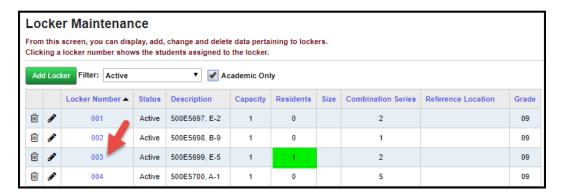
Use the View Free Lockers screen to list lockers not assigned to students and to assign a specific locker to the selected student. A student must be selected to view Free Lockers.



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.

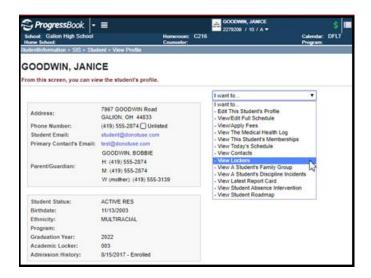


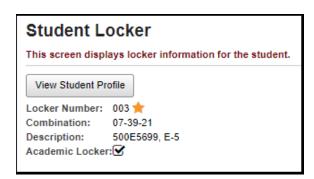


Task #13: View Locker Assignment from View Profile

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.





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.