

Meetings, Offers & Timetabling





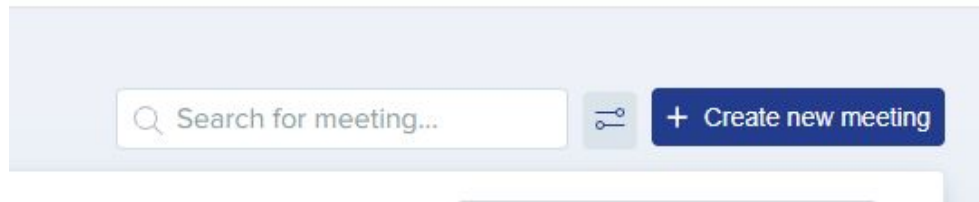
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Setting up a Meeting

Communications & Events > Meetings

Click to Create new meeting



Complete the Set Up step by adding the title and description of the meeting, as well as deciding how the meeting will be scheduled

Set Up

Title (keep it user-friendly, this will appear in your email invitation)*

Guidance Meetings

Description (keep it user-friendly, this will appear in your email invitation)*

These meetings will be to discuss your subject choices and suitability based on predicted grades

Configure the corresponding email templates:

How will the meeting be scheduled?*

- Applicants will be invited to choose their own meeting slots
- Staff will assign meeting slots before sending out invitations.

Choose an option here, and check the configuration of the corresponding email templates underneath

Select type(s) of emails you want to send, and customise message using personalisation tokens

Invitation Email* ⓘ

Email Subject Header

Invitation to interview at Greenford High School

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Paragraph

Hi **{{STUDENT_FIRST_NAME}}** **{{STUDENT_LAST_NAME}}**,

Thank you for applying to **{{SCHOOL_NAME}}**.

You are invited to attend the interview **{{INTERVIEW_TITLE}}** at **{{SCHOOL_NAME}}**

Please log on and select the date and times that suits you best.

{{DESCRIPTION}}

Please click on the link below to respond to this invitation

{{LINK}}

Best wishes,

{{SCHOOL_NAME}}

Attachments: (this will replace all the current files)

Remove attachments?

Confirmation Email* ⓘ

Email Subject Header

[Putney High School] Meeting Confirmation Details

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Paragraph

Dear **{{STUDENT_FIRST_NAME}}** **{{STUDENT_LAST_NAME}}**,

Thank you for accepting your meeting invitation.

For your reference, please see the details below.

Meeting: **{{INTERVIEW_TITLE}}**

Time: **{{START_TIME}}**

Date: **{{START_DATE}}**

Location: **{{LOCATION}}**

Description: **{{DESCRIPTION}}**

Kind regard,

{{TEACHER_NAME}}

You can also set reminders to go to those who have booked, and those who have not:

Reminder email to confirmed students ⓘ

Email Subject Header

Meeting Reminder

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Paragraph **B** U *I* [List Icons] [Link Icon] [Text Color Icon] [Background Color Icon] [Align Icon] [Image Icon] [More Icon]

This is a reminder of your upcoming meeting.

For your reference, please see the details below.

Meeting: **{{INTERVIEW_TITLE}}**

Time: **{{START_TIME}}**

Reminder email to unconfirmed students ⓘ

Email Subject Header

Meeting Reminder

Customise invitation message to your recipients, by using personalisation tokens

Mail Merge Field

Paragraph **B** U *I* [List Icons] [Link Icon] [Text Color Icon] [Background Color Icon] [Align Icon] [Image Icon] [More Icon]

Dear **{{STUDENT_FIRST_NAME}}** **{{STUDENT_LAST_NAME}}**

Thank you for applying to **{{SCHOOL_NAME}}**.

This is a reminder email for a meeting to which you have been invited.

Decide whether or not to include a list of preset questions for staff to ask during the meetings.

Set Up

Create Question Lists

Schedule Slots & Assign Staff

Create Question Lists

You probably set up a list of interview questions to be asked, and gave that list a name. Do you want to specify specific questions to be asked in this meeting?

Yes, I would like to create a list of questions

No, I want to skip this step

You can also view question templates you have previously made and assign those questions to any new meetings you create.

Move on to schedule the appointment slots and assign staff using the New meeting slots button.

Schedule Slots & Assign Staff

Add Students



+ New meeting slots

THU

FRI

SAT

Add new meeting slots

SAT

Start date **i**

Start time **i** :

End time **i** :

Set up as repeating slots?


Repeat on

Repeat ends

Length of each slot minute(s)

Gap between slots minute(s)

Number of attendees per slot **i** student(s)



Add the date of the meeting, and set the session start and end times as well as how long each appointment is, and how many students can be seen simultaneously.

If your meetings will repeat in subsequent weeks, you can set them to repeat and set an end date.

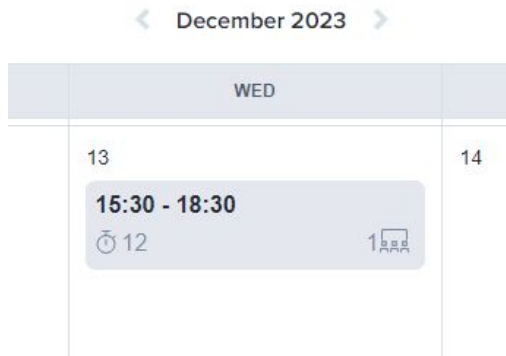
You'll then be able to assign staff to each slot, and add locations. You can update this row by row, or in bulk by selecting using the checkboxes.

You can update the assigned staff, attendee number, and location for multiple slots at once by selecting the corresponding rows and making changes in bulk.

1 to 12 of 12 entries

<input type="checkbox"/>	Meeting date	Start time	End time	Assigned staff	Location	Maximum Attendees
<input type="checkbox"/>	Wednesday, 13/12/2023	15:30	15:45	<input type="text"/>	<input type="text"/>	1
<input type="checkbox"/>	Wednesday, 13/12/2023	15:45	16:00	<input type="text"/>	<input type="text"/>	1






The meeting will then be displayed on the calendar, and you can repeat the process to add as many more meetings as needed.

You'll then be prompted to add students to the meeting - either one by one, from a group, or by using the advanced filtering option.

All meeting slots

All 12 Added 0 Invited 0 Confirmed 0 Completed 0 Incomplete 0 Not Attended 0 Not Confirmed 0 Canceled 0

Make Offer Change Offer Status Communications Reset meeting status Add to group Remove from group Remove students + Add students



Add new students to the meeting



Student

Group

Filter

Add to meeting

Depending on your setup, you will either be prompted to **invite students** (if they are choosing their own slots) or **allocate students and then invite them** (if you are assigning appointments for them).

When you click to invite the students, you will be shown the email template again so you can check it before clicking send.

Adding students to application groups

You can either add students to a meeting one by one, or in groups. To add a group, you first need to assign students to that group on your main dashboard.

To create an application group, click the “application groups” tab and then click the settings cog on the top right of the table:

Overview Reports **Application Groups** Offers Subjects Summary Timetables Tasks Calendar All Activities Group Link

Application Groups		
Processing Applications ⓘ	Green Abbey School update	External
Declined Applications (0)	0	0

New Group

Name *
Interview 1

Description

Enrolment status

Intended destination code

Reason compulsory

Reason choices (Type & hit Enter to add reasons)

Create Group

+ New Application Group

Then click “+ New Application Group”, give it a name and press “create group”.

Go back to your main dashboard and click to view a list of students. Select those who you wish to add to the group using the checkboxes on the left of the table (or select them all) and then use the “add to group” button to add them to the group you created:

The screenshot shows the 'Registered Students' interface. At the top, there are several action buttons: 'Change Application Status', 'Make Offer', 'Change Offer Status', 'Change Enrolment Status', 'Change Internal Status', 'Change Phase Status', 'Add to group', and 'Remove from group'. The 'Add to group' button is highlighted with a red box. Below these buttons are filters and view options. The table below shows 7 entries, with 7 rows selected. The first four rows are highlighted in blue, and their checkboxes are also highlighted with a red box. The table columns are ID, Student Code, First Name, Last Name, and Birthday.

	ID	Student Code	First Name	Last Name	Birthday
<input checked="" type="checkbox"/>	9215	9WY8	A13	A13	16/09/2008
<input checked="" type="checkbox"/>	13091	3DD5	A134	A134	27/07/2000
<input checked="" type="checkbox"/>	9204	0K9G	A2	A2	

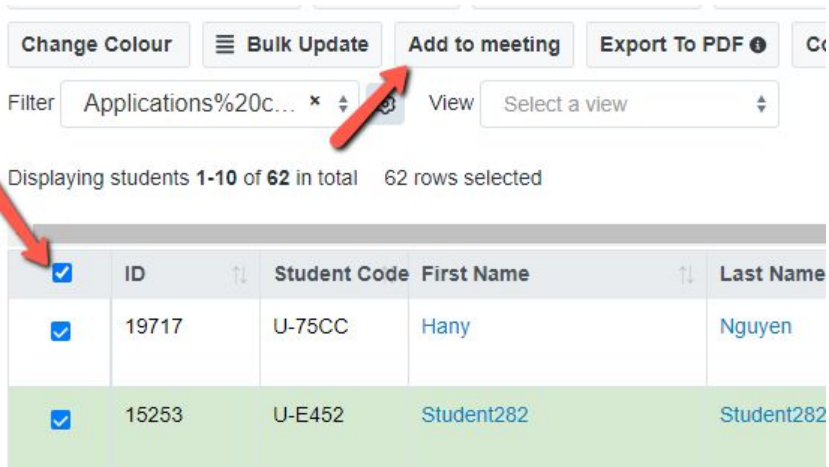
Return to the meetings area to add your group to the meeting - this does not send an invitation to them automatically, so you can add students in prior to being ready to invite them!

Adding students to a meeting from your main dashboard

Select a tile or a category, to load a list of students.

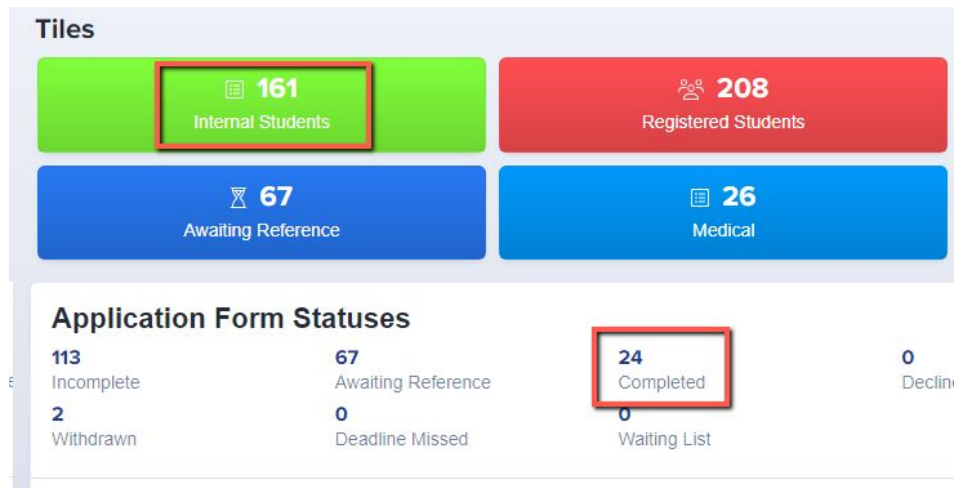
Select the students you want to add to a meeting and choose “add to meeting”.

You can then return to the meetings area to invite the students.



The screenshot shows a student list interface. At the top, there are buttons for 'Change Colour', 'Bulk Update', 'Add to meeting', and 'Export To PDF'. A red arrow points to the 'Add to meeting' button. Below the buttons, there is a filter dropdown set to 'Applications%20c...' and a 'View' dropdown set to 'Select a view'. Below this, it says 'Displaying students 1-10 of 62 in total' and '62 rows selected'. A table below shows student details with columns for ID, Student Code, First Name, and Last Name. A red arrow points to the first column of the table, which contains checkboxes for selecting students. The first three rows are visible, with the first row highlighted in green.

<input checked="" type="checkbox"/>	ID	Student Code	First Name	Last Name
<input checked="" type="checkbox"/>	19717	U-75CC	Hany	Nguyen
<input checked="" type="checkbox"/>	15253	U-E452	Student282	Student282



The screenshot shows a dashboard with four tiles and a section for application form statuses. The tiles are: 'Internal Students' (161), 'Registered Students' (208), 'Awaiting Reference' (67), and 'Medical' (26). The 'Internal Students' tile is highlighted with a red box. Below the tiles is the 'Application Form Statuses' section, which shows: 113 Incomplete, 67 Awaiting Reference, 24 Completed (highlighted with a red box), and 0 Declined. Below this, it shows: 2 Withdrawn, 0 Deadline Missed, and 0 Waiting List.

Tiles

- Internal Students: 161
- Registered Students: 208
- Awaiting Reference: 67
- Medical: 26

Application Form Statuses

- 113 Incomplete
- 67 Awaiting Reference
- 24 Completed
- 0 Declined
- 2 Withdrawn
- 0 Deadline Missed
- 0 Waiting List

Inviting applicants to interview

Once you have added students to a meeting, you then need to invite them. Visit your meetings area and click on the “all” button to see the list of meeting slots.

You will be notified if you have added any students who have not yet been allocated and/or invited.

Guidance Meetings

All 12

Added 2

Invited 2

Confirmed 0

Completed 0

Incomplete 0

Not Attended 0

Not Confirmed 2

Canceled 0

 Wednesday 13th, December 2023

 15:30 - 18:30



 You have 4 unallocated student(s)

[View details](#)

[Allocate students](#)

 You have 4 applicant(s) that have been allocated but have not been invited

[View details](#)

[Invite students](#)

You can check and amend the master copies of your invitation templates by navigating to communications and events > communications > automated messages

invite

Showing 1 to 2 of 2 entries (filtered from 37 total entries) Show 50 entries

Type	Template Name	Subject	Send from	Send to
	<input type="text" value="Search Template I"/>	<input type="text" value="Search Subject"/>	<input type="text"/>	<input type="text"/>
✉	Invite To Interview	This template is for meetings where you will be assigning them a time slot		Student
✉	Invite To Select Interview Slot	This template is for students who are selecting their own time slot		Student



When you are ready to send your invitations, you will be presented with the option to **send invitations** or **send invitations (no email)**.

The invitations are linked to the interview templates in your automated emails area, so you can send the same invitation to all applicants if that is your process - **but what if you need to send different invitations or information to different groups or individuals?**

This is where the **“send invitations (no email)”** function comes in. It enables you to send the students an invitation (ie put the “accept” and “decline” buttons on the student’s homepage), without sending them the master template.

You are then free to send them a bespoke email from the manual messages area instead!


To check the status of your invitations and ensure they have been sent to the applicants, scroll right on the table to view the **Invitation Status** column.

Invitations have to be sent to an applicant in order for them to be able to respond (accept or decline) so you can track responses.

Displaying 12 students

Show entries

<input type="checkbox"/>	Meeting Date	Time	Student Code	Email/Username	School	Room	Offer Status	Enrolment Status	Application Group	Meeting Status	Invitation status
<input type="checkbox"/>	03/11/2023	12:00 - 12:30	U-47EA	frost@example.com	Greenford High School - Sales Demo		Accepted	Enrolment waiting list	New Ranked Group	denied	delivered 20/10/2023 09:02:56 AM
<input type="checkbox"/>	03/11/2023	12:00 - 12:30									



Tracking responses to invitations

Hello Test Carolyne,



Test Carolyne Test Schowalter Student

Form Status

Completed

Offer status

Offer Made

Reference Status

bounce

Enrolled Subjects

A Level English, A Level Art and Design, A Level Business Studies

Reserve Subjects

GUIDANCE MEETINGS

These meetings will be to discuss your subject choices and suitability based on predicted grades

📅 13/12/2023 15:30 - 15:45

📍 Not available

Decline

Accept

Once you have sent your invitations, applicants will log into their accounts and will see something like this.

You can track their responses by clicking on the coloured boxes in your meetings area.

Hello Test Brigitte,



Test Brigitte Test Stoltenberg Student Cc

Form Status

Completed

Offer status

Pending

Reference Status

Not Sent

GUIDANCE MEETINGS

These meetings will be to discuss your subject choices and suitability based on predicted grades

Decline

Choose a time & accept invite

[Guidance Meetings](#)

All | 12

Added | 6

Invited | 6

Confirmed | 0

Completed | 0

Incomplete | 0

Not Attended | 0

Not Confirmed | 6

Canceled | 0

How to proceed if a student declines the invitation

Did the student decline because they cannot make it on the day/time you invited them to?

You can [remove them from the original meeting](#) and [add them to a new one](#) instead.

Are they declining because they no longer wish to continue their application to your school?

Here's how to [update a student's status](#) to withdrawn, or [delete their account](#) from your system.

MR JONES Declined

Appointments for Maths

📅 31/01/2024 14:31 - 14:33

📍 Not available

[Mr Jones](#) 

All | 19 ⓘ Allocated | 5 ⓘ Invited | 4 ⓘ Not Confirmed | 4 ⓘ Confirmed | 0 ⓘ Completed | 0 ⓘ Incomplete | 0 ⓘ Did not attend | 0 ⓘ Cancelled | 0 ⓘ Declined | 1 ⓘ

📅 Friday 24th, November 2023	🕒 13:00 - 15:00	👤 Maru Alliroz	👥 4 / 6
📅 Wednesday 31st, January 2024	🕒 14:31 - 14:56	👤	👥 1 / 13



Conducting your meetings/interviews

You can search for the applicant in the search bar and load their profile

Year 12 Admissions Admissions Y... Knowledge Base

Search: ariel

Applicants in this form:

Ariel Bhosale
ha+test220703@applicaa.com

Find them in the search bar

Click to load their profile

The screenshot shows a search bar containing the text 'ariel'. Below it, a list of applicants is displayed under the heading 'Applicants in this form:'. The first applicant, 'Ariel Bhosale' with email 'ha+test220703@applicaa.com', is highlighted with a red box. A red callout box with an arrow points to this entry, containing the text 'Click to load their profile'. Another red callout box with an arrow points to the search bar, containing the text 'Find them in the search bar'. The interface also shows navigation tabs for 'Year 12 Admissions' and 'Admissions Y...', and a 'Knowledge Base' button.

Click on their “interview” tab to access their interview note

Phone
School Greenford High School
Email

Overview Application Form Activities **Interview** Courses Select

The screenshot shows a profile card for an applicant. It includes a circular profile picture icon, contact information (Phone, School: Greenford High School, Email), and a row of action icons: an envelope, a printer, a document, a speech bubble, a magnifying glass, and a 'more' dropdown menu. Below the profile card is a horizontal navigation menu with tabs: 'Overview', 'Application Form', 'Activities', 'Interview', and 'Courses Select'. The 'Interview' tab is highlighted with a red box.





You can also access their appointment directly from your meetings area, by clicking the pencil icon

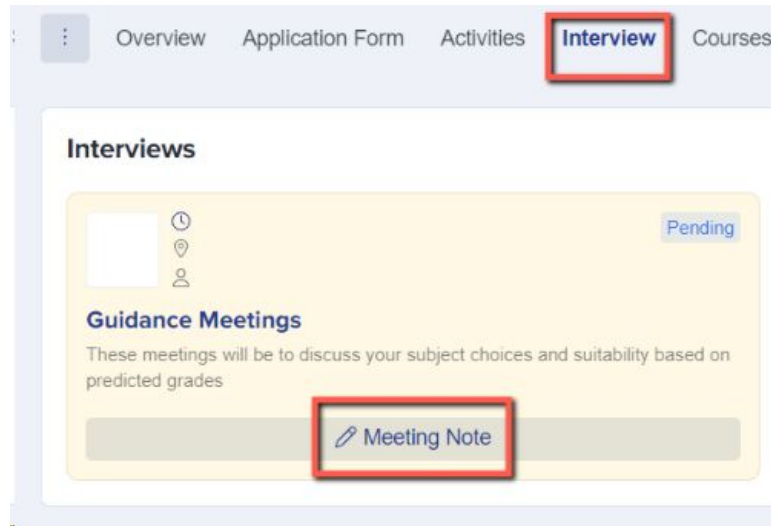
Meeting slots All 42 Allocated 42 Invited 0 Not Confirmed 42 Confirmed 0 Completed 0 Incomplete 0 Not Attended 0 Canceled 0 Declined 0

Make Offer Change Offer Status Communications Reset meeting status Add to group Remove from group Remove students Configure Meetings Settings Add students

Search in table Export

Displaying 42 students Show 50 entries

Meeting Date	Time	Teacher	Type of student	First Name	Last Name	Student Code	Email/Username	School	Room	Offer Status	Enrolmen	Action
02/02/2023	10:20 - 10:30	Tutor Demo	Internal	Ajoh	116684	U-5C86	student+16684@example.com	Greenford High	Room B	Pending	Pending	   



The meeting note contains the questions you added in your meeting template (if applicable).

Staff can type or select the answers for each question and then click to mark the interview as complete.

You can also complete other actions, such as marking them as a no-show and making them an offer.

Sally Dickinson

Resend invitation

Meeting cancelled

Mark as No-show

Offer Made



Application Form

Manage pins

View full application

Grades

Subject	Status	Grade	Grade by referee
---------	--------	-------	------------------

Course Selection

Basic Details

First Name	Sally
Middle Name	Empty
Last Name	Dickinson
Year group applied for	Empty
Expected Term Of Entry	Empty
Expected Year Of Entry	Empty
Phone Home	01632788026
Phone Mobile	Empty
Email	dickinson@example.com

Parent/Carer/Guardian Details

First Name	Ben
Middle Name	Empty
Last Name	Dickinson
Gender	Male
Relationship	Father
Phone Work	Empty
Phone Home	Empty
Phone Mobile	Empty
Email	Empty

Education

Current School	Greenford High School
----------------	-----------------------

Reference

Referee Name:	
---------------	--

Meeting Questions

How would you rank their suitability to join our sixth form? *

Have they carefully considered their A Level subject choices? *

Do their predicted grades match up with our entry requirements? *

Save for now

Save & mark as completed

Adding courses to the offer list

As part of your process, you can make offers to your applicants.

If you enable the offer courses listing, this will allow you to make a subject-specific offer to applicants - you could either confirm the courses they applied for, or offer them something else if their choices are not appropriate.

Navigate to **settings > application form > courses** and activate this option:

Activate Option Block view on courses step



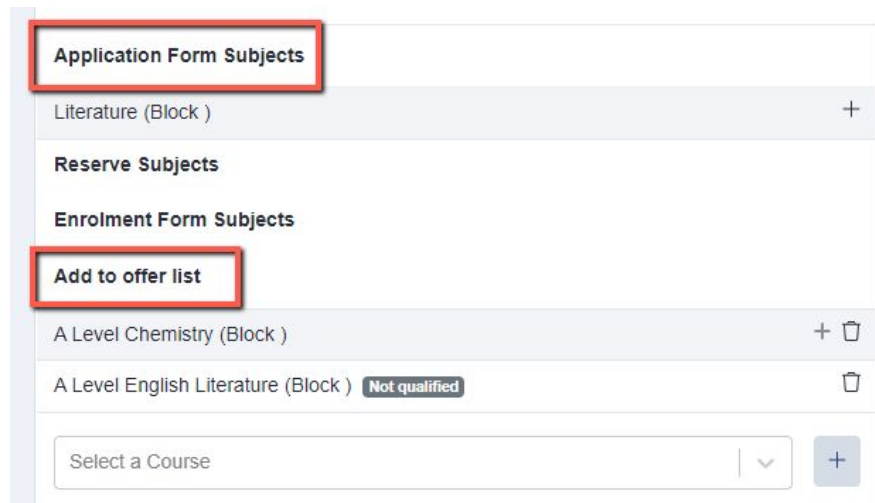
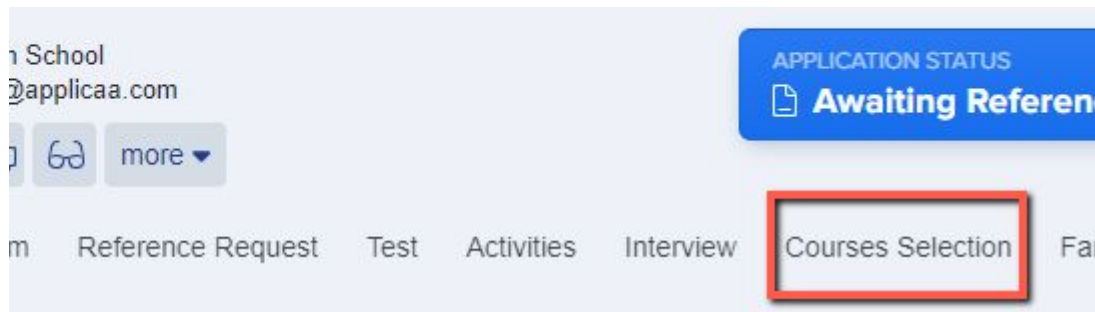
Use class title for class name display



Enable Offer Courses Listing

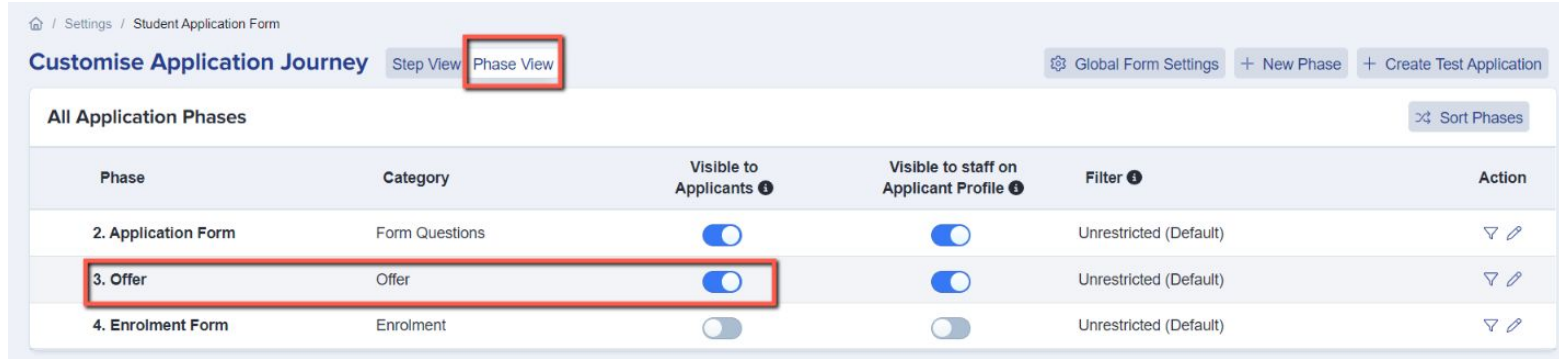


On a student's profile, click on their "courses selection" tab and you will see the subjects they applied for. You can then add the courses you wish to offer the applicant in the offer list



Making offers to students

Navigate to **settings > application form > phase view** and make your offer phase visible to applicants



The screenshot shows the 'Customise Application Journey' interface for a 'Student Application Form'. The 'Phase View' tab is selected. The table below lists the application phases and their visibility settings.

Phase	Category	Visible to Applicants	Visible to staff on Applicant Profile	Filter	Action
2. Application Form	Form Questions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Unrestricted (Default)	▽ ✎
3. Offer	Offer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Unrestricted (Default)	▽ ✎
4. Enrolment Form	Enrolment	<input type="checkbox"/>	<input type="checkbox"/>	Unrestricted (Default)	▽ ✎

The offer phase acts as a gate at enrolment; only students who have been made (and have accepted) an offer will be able to access and complete your enrolment form on results day.

Aside from the phase view settings, you can also check the offer status is visible to students on their homepage by navigating to **settings > form settings > student homepage** and activating this switch:

Settings

Button text for continue application button

Show Student Code



Show Application Status



Show Offer Status



Test Brigitte Test Stoltenberg Student Code: U-E55F

Form Status

Completed

Offer status
Pending

Reference Status
Not Sent

GUIDANCE MEETINGS

These meetings will be to discuss your subject choices and suitability based on predicted grades

Decline

Choose a time & accept invite

This is how it will appear to an applicant prior to making them an offer.



Test Brigitte Test Stoltenberg Student Code: U-E55F

Form Status

Completed

Offer status
Offer Made

Reference Status
Not Sent

This is how it will appear to an applicant once an offer is made to them.

APPLICATION OFFER

You received an offer on 14/11/2023.
Please respond below:

Decline Offer

Accept Offer

Check your offer email template by navigating to communications and events > communications > automated messages and locating this template:

offer

Showing 1 to 2 of 2 entries (filtered from 36 total entries) Show 50 entries

Triggered by	Phase	Triggered when	Repeat	Enable	Actions
Staff	Email Subscription	Withdraw offer	N/A		
Staff	Email Subscription	Make offer to student	N/A		

click to edit or preview

Mail Merge Field Subject Applied for 5 Insert Field

Paragraph

Thank you for your application to `{{SCHOOL_NAME}}`.

I am pleased to confirm that we can make you a conditional offer on the following courses you applied for:

`{{GET_OFFER_COURSE_1}}` `{{GET_INTERESTED_COURSES_1}}`
`{{GET_OFFER_COURSE_2}}` `{{GET_INTERESTED_COURSES_2}}`
`{{GET_OFFER_COURSE_3}}` `{{GET_INTERESTED_COURSES_3}}`
`{{GET_OFFER_COURSE_4}}` `{{GET_INTERESTED_COURSES_4}}`
`{{GET_OFFER_COURSE_5}}` `{{GET_INTERESTED_COURSES_5}}`

use whichever fields are most appropriate for your process

Please use the following link to log onto your application to review and respond to your offer.

`{{LINK}}`

Amend your template to reflect your process.

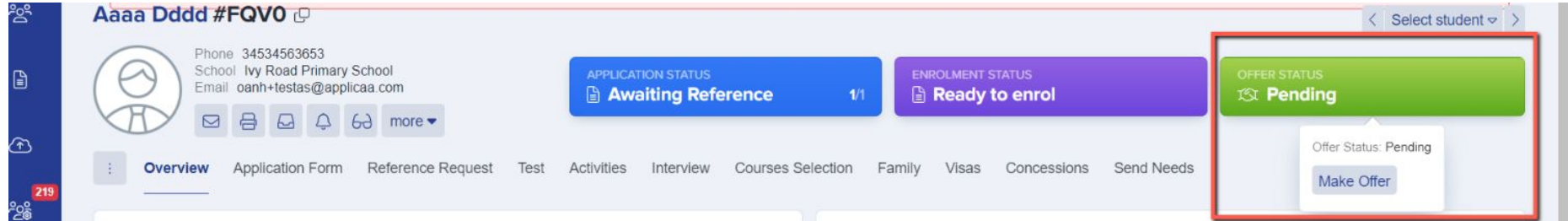
If you are using the offer list, use the “offered courses” merge fields.

If you don’t use the offer list, use the “applied for” merge fields. These fields are linked to the courses the student chose on their application form.

Alternatively you could opt not to use any courses mail merge fields and just make them a general offer of a place (without adding courses in).

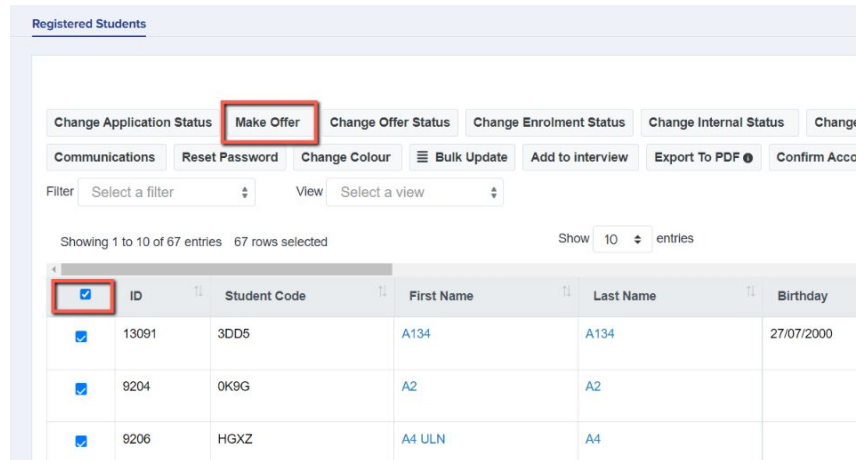
You can make offers **individually** or in **bulk**.

To send them **individually**, navigate to the student's profile and click the green "offer status" tile to bring up the "make offer" button.



The screenshot shows a student profile for 'Aaaa Dddd #FQVO'. The profile includes contact information: Phone 34534563653, School Ivy Road Primary School, and Email oanh+testas@applicaa.com. There are three main status tiles: 'Awaiting Reference' (blue), 'Ready to enrol' (purple), and 'Offer Status' (green). The 'Offer Status' tile is highlighted with a red box, and a tooltip is shown over it with the text 'Offer Status: Pending' and a 'Make Offer' button. Below the tiles is a navigation menu with options like Overview, Application Form, Reference Request, Test, Activities, Interview, Courses Selection, Family, Visas, Concessions, and Send Needs.

To send them in bulk, click on an application group from your main dashboard to load a list of students. Select them using the checkbox on the top left of the table and then click the "make offer" button



The screenshot shows a 'Registered Students' table with the following columns: ID, Student Code, First Name, Last Name, and Birthday. The first row is selected with a checkbox. The 'Make Offer' button is highlighted with a red box. The table shows 67 rows selected and 10 entries displayed.

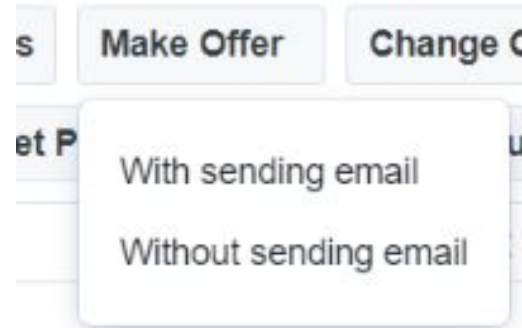
ID	Student Code	First Name	Last Name	Birthday	
<input checked="" type="checkbox"/>	13091	3DD5	A134	A134	27/07/2000
<input checked="" type="checkbox"/>	9204	0K9G	A2	A2	
<input checked="" type="checkbox"/>	9206	HGXZ	A4 ULN	A4	

Making offers **with** or **without** sending email:

The “make offer” button is linked to the offer template in your automated emails area, so you can send the same offer letter to all applicants if that is your process - **but what if you need to send different offers to different groups or individuals?**

This is where the “**make offer: without sending email**” function comes in. It enables you to make the students an offer (ie put the “accept” and “decline” buttons on the student’s homepage), without sending them the master template.

You are then free to send them a bespoke email from the manual messages area instead!



Tracking responses to offers

From your main dashboard, you can track the status of your offers by navigating to the Phase Status Details table and clicking the “offers” tab

Phase status details

Application

Offers

Enrolments

Status

Internal

External

Pending (1571)

pending = students you have not yet made an offer to

227

1344

Offer Made (92)

offer made = students have been made an offer

4

88

Accepted (7)

accepted = students have logged in and accepted their offer

1

6

Declined (3)

declined = students have logged in and declined their offer

1

2

Offer Withdrawn (14)

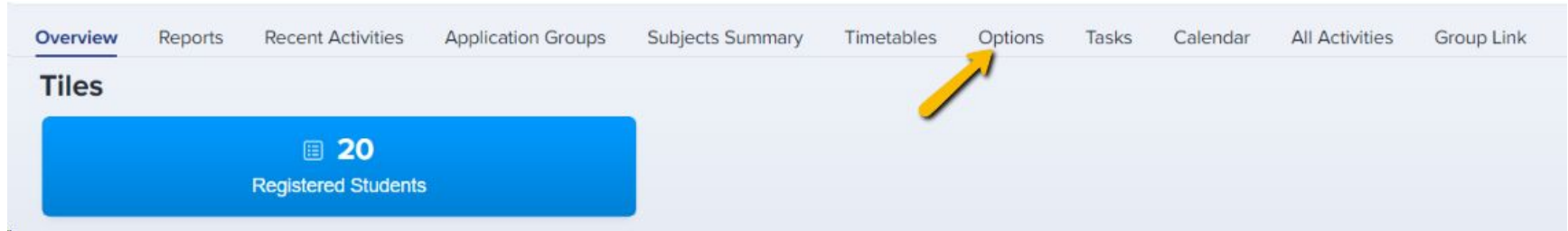
offer withdrawn = you made this student an offer but have now made the decision to withdraw it from them

2

12

Creating Your Timetable

Our Options module enables you to build a best-fit model for your timetable, based on the combination of subjects chosen by your applicants.



The screenshot shows a navigation menu with the following items: Overview, Reports, Recent Activities, Application Groups, Subjects Summary, Timetables, Options, Tasks, Calendar, All Activities, and Group Link. The 'Options' item is highlighted with a yellow arrow. Below the menu, there is a 'Tiles' section with a blue button that says '20 Registered Students'.

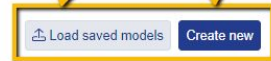


Options Block Modelling

This wizard will help you create a "best-fit" model for your options blocks, which will allow the highest number of applicants as possible to study their chosen subjects.

You can either start a new model, or load a previously-created one below.

If you've already been working on a model, you can load this here, or click to start from the beginning



Two buttons are shown: 'Load saved models' with a download icon and 'Create new'.

Tell the wizard the names of your blocks, for example A, B, C, D, E - add a new row for each block.



Blocks

To get us started, please tell us how many timetable blocks are used for your options subjects

Block order	Block's name in timetable
1	<input type="text"/>

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[+ Add new row](#) [✓ Confirm and continue](#)

Add the name of each block; for example: A

Click to add a new row for each block, then confirm and continue

Blocks

To get us started, please tell us how many timetable blocks are used for your options subjects

Block order	Block's name in timetable
1	A
2	B
3	C
4	D
5	E

Next, the wizard will show the list of your courses - it will need to know the **shortcodes** for these courses (for example, Art may be Ar, Business might be Bu, etc.) and each course will need a unique code.

Apply the **thresholds** for your courses - the minimum and maximum numbers in order to safely and effectively run - you can set a different threshold for each course.

Warn me when class size exceeds	Warn me when class size is below
20	5
30	8

Start Blocks Subjects

Subjects

Tell us about the subjects you will be including in this model.

We have already loaded in your existing subjects. You can add new subjects and also choose which should

Subject	Short code (2 letters)
Art and Design	Ar
Biology	Bi
BTEC Applied Science (Triple)	Ap
BTEC Business (Double)	B2
BTEC Business (Triple)	B3
BTEC H&SC (Triple)	H3
BTEC IT (Single)	It
BTEC Sport (Single)	Sp
Business Studies	Bu

The formatting is automatic: when you add a code, it will automatically make this Capital:Lower Case (eg Ar for Art)

Set the **width** of your courses. This means how much weight the course has; is it a single A Level? If so, add the number 1. If the courses is a double, add the number 2, or 3 for a triple.

Subject	Short code (2 letters)	Warn me when class size exceeds	Warn me when class size is below	Number of blocks per class
Art and Design	<input type="text" value="Ar"/>	<input type="text" value="20"/>	<input type="text" value="5"/>	<input type="text" value="1"/>
Biology	<input type="text" value="Bi"/>	<input type="text" value="30"/>	<input type="text" value="8"/>	<input type="text" value="1"/>
BTEC Applied Science (Triple)	<input type="text" value="Ap"/>	<input type="text" value="25"/>	<input type="text" value="6"/>	<input type="text" value="3"/>
BTEC Business (Double)	<input type="text" value="B2"/>	<input type="text" value="28"/>	<input type="text" value="10"/>	<input type="text" value="2"/>

Once your settings are in place, click “confirm and continue”. It will check for any errors before allowing you to move on, for example if you have not used a unique code for each subject:

Spanish	<input type="text" value="Sp"/> <small>This code is not unique. Please choose another.</small>
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Move onto the students step, to decide which filters you would like to apply: do you only want to build the timetable based on **completed applications**? Or maybe only on those you have made **offers** to? Leave everything blank if you want to see what would happen if all of your applicants enrolled or click “filter” to apply any settings you have selected.

Students

Please use the tick-boxes below to select the students you wish to be included when generating this model. For example, if you wish the model to take account of only students you have placed in a 'short-list' group you have created of likely attendees, then select that group below.

Advanced Filters

Status ?

Properties >

Application Form Response >

Reference Form >

Exam Result >

Total Point Score >

Average Point Score >

Number Of Qualifications >

Additional Columns >

Student Type

Internal

External

Application Status

Incomplete

Awaiting Reference

Completed

Declined

Withdrawn

Deadline Missed

Waiting List

Enrolment Status

Pending

Details To Be Checked

Ready To Enrol

Enrolled

Enrolment Waiting List

Enrolment Declined

Offer Status

Reading

Offer Made

Accepted

Declined

Offer Withdrawn

Interview Status

Pending

Complete

Accepted

Denied

Application Forms

All Application Forms

Tag

Filter **Save Filter**

Click to apply filters

Saved Filters

Filter Summary ?

Application Status: Completed ×

Offer Status: Offer Made, Accepted ×

Reset Params

Once your filters are in place, “select all” students and click to “confirm and continue”.

On the “Choices Options” step, you can set which options to build the model on:



Start



Blocks



Subjects



Students



Choices Options

Choices Options

Select students' options to build the model

- Interested and Reserve subjects
- Interested subjects
- Offered subjects

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On the “classes” screen, you will see the number of students per course, and can specify how many **teaching groups** you would be able to offer (based on your current staffing).

This will then show you how many students would be in each class for that particular course/subject.

You can also add a “projected number” calculation, which will apply a conversion rate to your numbers.

If you want, we can reduce the 'projected number' of students for each class by a certain percentage which you can enter here.

For example, if you know that only 80% of your applicants end up attending in September, you can enter '80' in this box, and we will adjust the projected class sizes below accordingly.

When calculating class sizes, assume that percent of internal applicants and percent of external applicants will attend in September.

The average class size column will be colour-coded to highlight any classes which would be too big or too small, based on the settings you have added earlier on in the wizard.

Subject	Students wanted	Teaching groups	Average class size
Art and Design	52	<input type="text" value="1"/>	52
Biology	323	<input type="text" value="3"/>	108
BTEC Applied Science (Triple)	29	<input type="text" value="2"/>	15
BTEC Business (Double)	33	<input type="text" value="2"/>	17
BTEC Business (Triple)	18	<input type="text" value="1"/>	18
German	1	<input type="text" value="1"/>	1
Government and Politics	84	<input type="text" value=""/>	

Annotations:

- A yellow callout box points to the '1' in the 'Teaching groups' column for 'Art and Design' and the '52' in the 'Average class size' column. The text reads: "Here, 1 class is not enough for Art, based on your maximum class sizes (so you might need to consider hiring another Art teacher)".
- A yellow callout box points to the '1' in the 'Teaching groups' column for 'German' and the '1' in the 'Average class size' column. The text reads: "This helps you to see which classes would not be cost-effective to run".

The next screen will enable you to **pin** any classes which have to be in a particular block.

For example, if you know that Art can only run in block A, you can pin it here so it is locked in that block and can't be moved whilst the remaining blocks are being calculated.

The screenshot shows a progress bar at the top with steps: Start, Blocks, Subjects, Students, Choices Options, Classes, **Pin Classes**, and Place Classes. A 'Load' button is on the far right. Below the progress bar, the 'Pin Classes' section has a title and two paragraphs of text. The main area contains five input boxes labeled A, B, C, D, and E. Box A contains '12A/Ph' and box C contains '12C/Ch'. At the bottom, there is a 'Back' button, a '+ Add new pinned class' button, and a 'Confirm and continue' button.

Pin Classes

This step allows you to pre-set where some of the classes must go.

If you are completely flexible just continue to the next step and we will place your classes in the best place to accommodate your students' choices.

A 12A/Ph

B

C 12C/Ch

D

E

← Back

+ Add new pinned class

✓ Confirm and continue

The screenshot shows a dialog box titled 'Add new pinned class' with the question 'Which subject do you want to add a pinned class?'. A list of subjects is displayed, with 'Art and Design' highlighted. A yellow callout box says 'Click "add new pinned class" and then select the subject you want to pin'. The background shows the 'Pin Classes' step from the previous screenshot. At the bottom, the '+ Add new pinned class' button is highlighted with a yellow box.

Add new pinned class

Which subject do you want to add a pinned class?

Art and Design

Biology

BTEC Applied Science (Triple)

BTEC Business (Double)

BTEC Business (Triple)

BTEC H&SC (Triple)

BTEC IT (Single)

BTEC Sport (Single)

Business Studies

Chemistry

Computer Science

Design Technology

Economics

English Literature

French

Further Mathematics

GCSE - English Retake

GCSE - Mathematics Retake

Geography

German

Government and Politics

History

Mathematics

Media Studies

Philosophy, Ethics & Religion

Physics

Psychology

Sociology

Spanish

Cancel

Click "add new pinned class" and then select the subject you want to pin

+ Add new pinned class

✓ Confirm and continue

The screenshot shows a dialog box titled 'Add new pinned class' with the question 'Choose 1 block that you want to add for Art and Design?'. A dropdown menu shows 'A' selected. Below the dropdown, it says 'You can only select 1 item'. At the bottom, there are 'Cancel', 'Back', and 'Save' buttons.

Add new pinned class

Choose 1 block that you want to add for Art and Design?

A

You can only select 1 item

Cancel

Back

Save

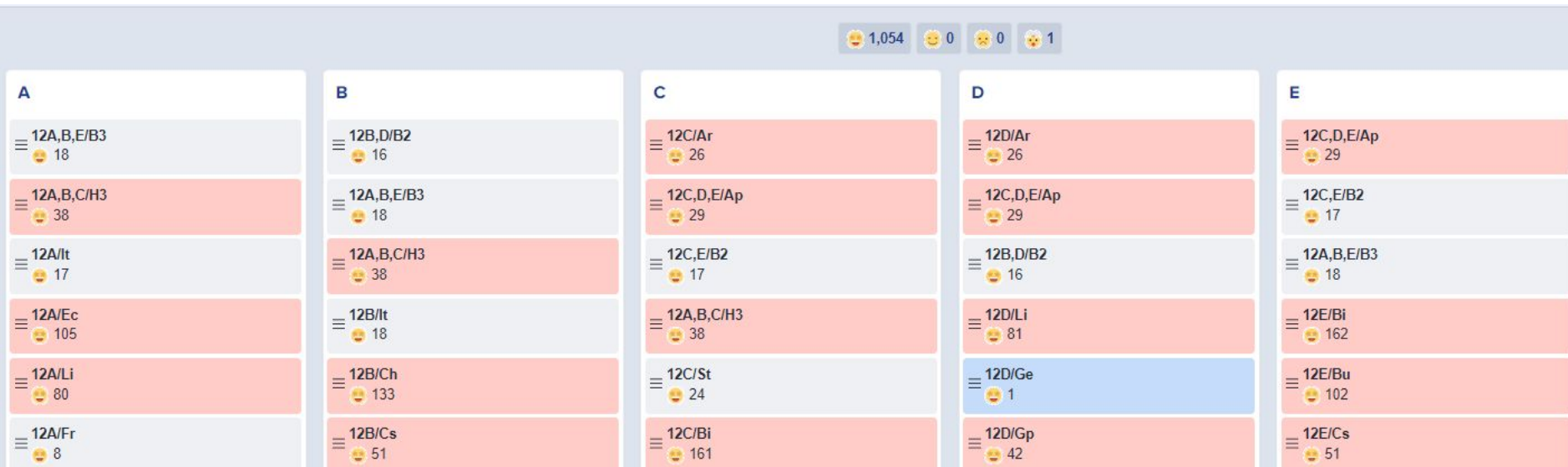
The **emoticons** will show you how happy the students are going to be, based on their choices versus what is available to them.

Students who have been allocated to their main choices will show as **excited**.

The next face shows students who are **happy** - they got most of their choices, but one is a reserve subject (if you used reserves at application stage).

The **sad** face shows students who are allocated to none of their main subjects, only reserves.

The **devastated** face indicates students have not been allocated at all, based on the current model being projected.



Click to the **devastated** face to view the students who haven't been able to be accommodated at all, to see what else is available to them and you can allocate them to an alternative course using the "select classes" button.



The screenshot shows a 'Happiness report' window. At the top, it says '1 student have not been allocated' with a devastated face emoji. Below this is a table with columns for '#', 'Name', and 'Choices'. The table contains one row for student 'Aggg Aggg16498'. The 'Choices' column for this student lists 'Main choices' with two items: 'Design Technology' and 'English Literature'. To the right of the choices is a button labeled 'Select classes'. In the background, a sidebar shows a 'devastated' face icon with the number '1' next to it, which is highlighted with a yellow box.

#	Name	Choices
1	Aggg Aggg16498	Main choices <ul style="list-style-type: none">• Design Technology• English Literature



You will see the **total % of successfully allocated students**, based on their first choices.

You can also **make copies** of the model, so you can play around but keep the master copy undisturbed.



Run an **allocations report** to download a CSV and see which classes each student would be allocated to, based on your model.

You can **pin any classes you are happy with**, so their position is retained when making other changes. Hover over a class to **pin, duplicate** or **remove** a class.

If you duplicate a class, it will create a copy of it underneath, and will automatically divide the number of students between the two groups.



On each block, you have the function to manually add extra classes.

You can also click on each class to view who is allocated to it, and which other subjects they are also allocated to.

A

- 12A,B,E/B31
👤 9
- 12A,B,E/B32
👤 9
- 12A,B,C/H3
👤 38
- 12A/It
👤 17
- 12A/Ec
👤 105
- 12A/Li
👤 80
- 12A/Fr
👤 8
- 12A/Ma
👤 188
- 12A/Re
👤 20
- 12A/Ph
👤 72
- 12A/Ps
👤 105
- 12A/So
👤 87

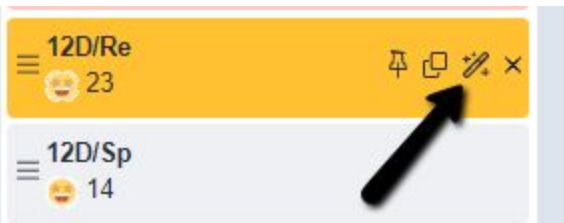
+ Add new class

Calendar All Activities

12D/Ar - Art and Design
26 students

Click on the name of a class to view the students and see which other classes they are allocated to

#	Name	A	B	C	D	E
1	Aiza Aiza16500		Geography		Art and Design	Design Technology
2	Anastasiia Anastasiia17833	Mathematics		Psychology	Art and Design	
3	Ashivene Ashivene16164		Sociology		Art and Design	Business Studies
4	AYESHA AYESHA16848	Economics		Biology	Art and Design	



Use the **Smart Allocation** feature to test a subject out in different blocks, and see what that does to the percentage of students allocated - this lets you test things out before you move them!

Philosophy, Ethics & Religion - 12D/Re

Smart class allocation

Click 'Test in other blocks' to see how moving the class to another blocks will affect student allocation

Block	Score	
A		<button>Move it here</button>
B		<button>Move it here</button>
C		<button>Move it here</button>
D	100.0 %	Current block
E		<button>Move it here</button>

Close Test in other blocks

Once you are happy with the best fit, click to “**publish**” and this will then apply these settings to the Timetables area of your system, so your subjects are set up in Option Block format ahead of enrolment/results day.

Click to **update offers** and this will update the **offer courses listing** for each student (so if you make offers after you’ve done your timetabling, you can make them offers based on the classes they will fit into as per your model.

Create the classes in your MIS!



Useful Information

Support Telephone Number: 0208 762 0882

Access all [Meetings and Offers guides](#)

Access [Timetabling and Options guides](#)

The background features a central light blue hexagon. To its top-left is a grey hexagon, and to its top-right is an orange parallelogram. Below the central hexagon are three smaller hexagons: a dark blue one on the left, a light blue one on the right, and a very small light blue one at the bottom center.

Do you have any questions?

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