Assigning Lockers to Students
Procedural Checklist

Change Log

Date	Section Number/Name	Change Description
05/03/17	Entire doc	Update screenshots
10/27/14	Entire doc	Update screenshots and breadcrumb trails
11/15/11	Entire doc	Added task #s & updated scrn shots
5/17/11	Before Assigning Lockers	Added FYI

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Task #1: Create 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

From this screen, you can display, add, change and delete data pertaining to locations.

Add Location

		Code	Name ▲	Description	Location Type	Capacity	Schedulable	Homeroom	Active
🗑	✏	28	Art Room		Art Room	30	☑	☐	🟢
🗑	✏	31	Cafeteria		Cafeteria	150	☐	☐	🟢
🗑	✏	30	CCESC Preschool		Regular Classroom	30	☐	☑	🟢
🗑	✏	03	CLASSROOM		Not Specified	30	☑	☑	🟢
🗑	✏	14	CLASSROOM		Not Specified	30	☑	☑	🟢
🗑	✏	19	CLASSROOM		Regular Classroom	30	☑	☑	🟢
🗑	✏	20	CLASSROOM		Regular Classroom	30	☑	☐	🟢

Task #2: Create Locker Size Codes

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

Locker Size Maintenance

From this screen, you can display, add, change and delete Locker Size codes.

Add Locker Size Code

		Code	Name ▲	Active
🗑	✏	LG	Large Locker	🟢
🗑	✏	MD	Medium Locker	🟢
🗑	✏	SM	Small Locker	🟢

☑ Show Active Only

Task #3: Create Lockers

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 Locker] Filter: [Active ▾] ☑ Academic Only

		Locker Number ▲	Status	Description	Capacity	Residents	Size	Combination Series	Reference Location	Grade
🗑	✏	1001	Active	A116	1	0	SM - Small Locker	1	A102 - MS. JONES	12
🗑	✏	1002	Active	A110	1	0	SM - Small Locker	1	A102 - MS. JONES	12
🗑	✏	1003	Active	A116	2	0	MD - Medium Locker	1	A102 - MS. JONES	12
🗑	✏	1004	Active	A110	3	0	LG - Large Locker	1	A102 - MS. JONES	12
🗑	✏	1005	Active	A116	3	0	LG - Large Locker	1	A108 - MRS. FRANKS	12

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.**

Locker Number:* [   ]

Academic Locker: ☑

Locker Status:* [▾]

Description: [   ]

Capacity:* [▾]

Size: [▾]

Current Series: [▾]

Reference Location: [▾]

Grade: [▾]

Is Active: ☑

Series: Combination:

[1 ▾] [   ] [Add Combination]

[Save] [Save and New] [Cancel]

(F.Y.I. note)

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 enter the Combination and select a Combination Series, then click Add Combination. Once you have done this, you can select that Combination Series from the Current Series drop-down.

Series: Combination:

3 ∨		Add Combination

	Series	Combination
🗑	1	4-6-11
🗑	2	11-21-31

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

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

ⓘ 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

Filter By Location: A107 - MR. MILLER ∨ ☑ Academic Lockers

	Starting Locker ▲	Ending Locker	Available Lockers	Capacity
🗑	1001	1010	10	15

	Physical Capacity	Total Capacity
	10	15

Starting Locker:* [   ]

Ending Locker: [   ] [Add Range]

Task #5: Assign Locker Grade Levels

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

Filter By Grade Level: `11` ☑ **Academic Lockers**

	Starting Locker ▲	Ending Locker	Available Lockers	Capacity
🗑	2001	2124	124	124

			Physical Capacity	Total Capacity
			124	124

Starting Locker:* [   ]

Ending Locker: [   ]   **Add Range**

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

Student lockers can be assigned to a group of students selected by one of three different methods: search by Search Criteria, search by Student IDs, or search by Ad-Hoc Membership. Unless otherwise noted, see Student Locker End User Documentation for details.

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

Student 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.

Locker Bulk Assignment

Here you can assign a bulk group of students to lockers

| Students | Assignment Method | Options | Confirmation | Results |

Select Students By: ● Search Criteria   ○ Student IDs   ○ Ad-Hoc Membership

Last Name: [_____]   **First Name:** [_____]

Homeroom Assignment: [_____ ▼]   **Gender:** [__ ▼]

Program: [_____ ▼] **Team:** [__ ▼]

Student Status

```
A - BLSD active resident student
AOU - Agreement of Understanding
AUT - Autism Scholarship Participant
BDD - BDD Unit
CAA - Caretaker Authorization Aff.
CCP - College Credit Plus
```

Grade Level

```
09 - 09
10 - 10
11 - 11
12 - 12
13 - 13
GR - GR
```

[Cancel]   [Next >]

Students Tab - Search by Student ID
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 separate Student ID number.

Locker Bulk Assignment

Here you can assign a bulk group of students to lockers

| Students | Assignment Method | Options | Confirmation | Results |

Select Students By: ○ Search Criteria ● Student IDs ○ Ad-Hoc Membership

*

Cancel   Next >

Students Tab - Search by 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 Membership, and more details can be found in the Getting Started Procedural Checklist.)
If you went to the Ad-Hoc Membership screen, select Go to return to the Bulk Locker Assignment screen when you have the correct Membership and the correct students.

Locker Bulk Assignment

Here you can assign a bulk group of students to lockers

Students	Assignment Method	Options	Confirmation	Results

Select Students By: ○ Search Criteria ○ Student IDs ● Ad-Hoc Membership

Ad-Hoc Membership:* [▾] [...]

[Cancel] [Next >]

 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: by Grade Level, by Homeroom, by Class Period, in Alphabetical order, and by 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: ● Grade Level ○ Homeroom ○ Class Period ○ Alphabetical ○ Random ○ Clear

ℹ This assignment method will assign lockers to students by selecting ascending lockers for students based on the student's grade level. The application will attempt to assign all students to lockers configured for the students' grade levels.

ℹ 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**, 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**, then use the calendar to choose a school day, and the pull-down to 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 assignment" 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:

- ● Students without a primary locker assignment
- ○ Students without any locker assignments
- ○ Students with number of assignments fewer than: 2 ⭥
- ○ 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] [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, select Finish to proceed to the Results tab. If the numbers are not reasonable, select **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
Here you can assign a bulk group of students to lockers

| Students | Assignment Method | Options | Confirmation | Results |

Lockers Defined by Grade Level	Physical Lockers	Total Capacity	Existing Assignments	Remaining Capacity	Matching Students	Insufficiency
09 - 09	45	45	44	1	14	13
10 - 10	59	59	55	4	23	19
11 - 11	63	63	57	6	20	14
12 - 12	49	49	38	11	31	20
23 - 23	0	0	0	0	3	3
No Grade Level	2	2	2	0		
All Students/Lockers	218	218	196	22	91	69

[Cancel] [< Back] [Finish]

If you selected Homeroom, Grade Level, 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.

Locker Bulk Assignment
Here you can assign a bulk group of students to lockers

| Students | Assignment Method | Options | Confirmation | Results |

☑ Include statistics for locations with insufficient capacity only

Lockers Defined by Location	Physical Lockers	Total Capacity	Existing Assignments	Remaining Capacity	Matching Students	Insufficiency
1080 - Section 4 (159)	0	0	0	0	1	1
1080 - Section 1 (204)	0	0	0	0	1	1
1080 - Section 2 (206)	0	0	0	0	2	2
1101 - Section 4 (207B)	0	0	0	0	1	1
601 - Section 1 (274)	0	0	0	0	1	1
400 - Section 27 (306)	0	0	0	0	1	1
1186 - Section 1 (A4)	0	0	0	0	1	1
All Students/Lockers	1357	1357	1020	337	8	

[Cancel] [< Back] [Finish]

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

Locker Bulk Assignment

Here you can assign a bulk group of students to lockers

| Students | Assignment Method | Options | Confirmation | Results |

Physical Lockers:	218
Total Capacity:	218
Existing Assignments:	196
Remaining Capacity:	22
Students to be Assigned:	91
Insufficiency:	69

[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 screen 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 locker lists and reassign lockers. Note that 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.

Locker Bulk Assignment

Here you can assign a bulk group of students to lockers

| Students | Assignment Method | Options | Confirmation | Results |

Student	Locker	Action Taken
FLEMMING, CAROL	0234	Added assignment as primary locker
FLEMMING, CAROL	1217	Removed assignment
MILES, MICHAEL	1321	Added assignment as primary locker
MILES, MORGAN	3308	Added assignment as primary locker

Task #7: Clearing Locker Assignments

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.

Task #8: Single Locker Assignment on Registration page

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 -- ∨ | | | | | |

Availability: 1 ⬍   Auto Select ☐   [Filter]

Locker Number	Grade Level	Location	Available	Residents	Capacity	Series	Combination	
0100	13	None	1	0	1	4	01-17-09	Change Series
0101	13	None	1	0	1	4	05-16-48	Change Series
0102	13	None	1	0	1	4	03-11-40	Change Series

Task #9: Single Locker Assignment on Edit Profile

You can also run the Locker Selection Wizard from the Assign Primary Locker button on the Student Profile Maintenance screen.

Note: Clicking on the **Locker Assignments** title on the Student Profile Maintenance screen will take you to the Student Locker Assignment page (see next step).

Edit Student Profile
From this screen, you can display and change information regarding a students profile.

| General | Additional | Custom | Private | FS-Standing | FS-Attendance | FD-Attributes | FN-Attributes | FN-Graduate | Transportation |

[Save]   [Cancel]
Last Modified: 05/3/2017 9:59 AM by User: Devin.Launder

Primary Building:*   LIMA SENIOR HIGH SCHOOL ∨
Special Ed: 0   ×   Country of Origin:
Citizenship: 04 - United States citizen ∨

Building Progression Track: LMSH - LIMA SENIOR HIGH SCHOOL   ∨   Graduation Year:
New School: ∨

Pri. Graduation Rule: 2014   ∨   Alt. Graduation Rule: ∨
Counselor: CAMPBELL, SCOTT (*) ∨   Scheduling Priority: 5 ∨
☑ Show grade appropriate counselors only   Locker Assignments: [Assign Primary Locker]

Task #10: Single Locker Assignment on Locker Assignment page

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.

Student Locker Assignment

From this screen, you can display, assign, and remove a student from a locker.

View Free Lockers	✓ Academic Lockers					
		Locker Number	**Description**	**Capacity**	**Size**	**Combination**	**Reference Location**
🗑	⭐	0234		1		14-33-25	Not Specified

Enter a Locker: [   ]

ORSelect a Locker: [▼] ✓ Show grade appropriate lockers only

ORSelect a Location: [▼]

Add locker as primary ✓ | Assign Locker | Edit Student Profile

Task #11: View 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.

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 ▲	**Status**	**Description**	**Available Capacity**	**Residents**	**Capacity**	**Size**	**Reference Location**	**Grade**
0100	Active		1	0	1		Not Specified	13
0101	Active		1	0	1		Not Specified	13
0102	Active		1	0	1		Not Specified	13
0103	Active		1	0	1		Not Specified	13

Task #12: View Locker Resident

Student locker assignment can be accessed by going to the Locker Administration: Lockers 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 profile screen and make that student your actively selected student.

Locker Resident

This screen displays students assigned to a specific locker.

Viewing students assigned to locker 1321

Student
MILES, MICHAEL

Back to Locker

Task #13: View Locker Assignment from Lockers page

From the student profile screen, you can also select "View Lockers" from the "I want to…" drop-down menu to see summary information about all lockers assigned to that student. The 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: 1321 ⭐
Combination: 44-49-28
Description:
Academic Locker: ☑

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

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

Student Locker Allocation (LOCK)

From this screen, you can select parameters to generate a report.

Selection Criteria	Selection Summary	Load Settings

Homeroom Date: * 5/3/2017 📅

Locker Status

Active
Repair
Unavailable

Locker Grade Level

07 - 07
08 - 08
09 - 09
10 - 10

Student Status

A - ACTIVE RES
D - DELETED
EG - EARLY GRAD
G - GRAD ONLY

Student Grade Level

07 - 07
08 - 08
09 - 09
10 - 10

Administrative Homeroom

100 - FOSNAUGH (Full Year Term)
101 - LUCIO (Full Year Term)
103 - BALOGUN (Full Year Term)
105 - VAUGHN (Full Year Term)

Academic Lockers Only: ✔
Include Unassigned Lockers: ✔

Sorting Options

Student Number (ASC)
Student Number (DESC)
Student Name (DESC)
Grade (ASC)

Student Name (ASC)

Delivery Method: Pickup   [Set As Default]

Email Address: Devin.Launder@mcoecn.org

Report Format: Adobe PDF

Description:

[Submit]