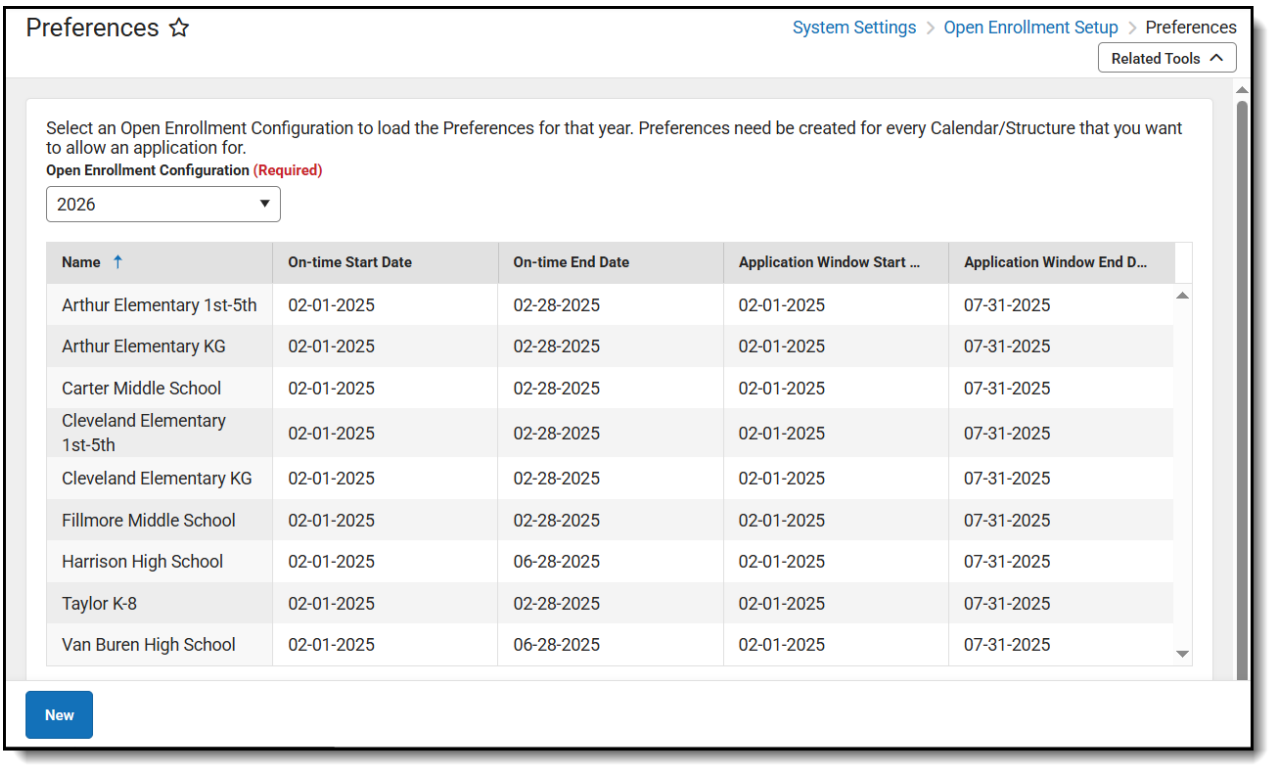
Preferences (Open Enrollment Setup)

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Tool Search: Preferences

The Preferences tool configures each Preference from year to year. Preferences are connected to a School, a Calendar, and a Schedule Structure. These Preferences are the Application choices available via OLR for parents to select for their students. They have grades, rules, and flags assigned to them as well as on-time and application windows.

See the Open Enrollment Setup Tools Tool Rights article for information on rights needed to use this and related tools.



Important Information Before Creating Preferences

- Once saved, the Name, School, Calendar, and Structure cannot be edited. The Preference would need to be deleted and recreated to change those fields.
- Imports may be used to quickly apply predefined selections from Templates or clone previously created Preferences. An import will not remove existing assignments, nor will it overwrite existing entries if they already exist. It is recommended that the import is done first, and additions and modifications are done afterwards.

- Exporting the assignments will create Templates for future use.
- Once a Preference is attached to an OLR Application or an Open Enrollment Application, it cannot be deleted. Those applications would need to be removed first.

Viewing Open Enrollment Preferences Configuration

Select an Open Enrollment Configuration to load the Preferences for that year. Preferences need to be created for every Calendar/Structure for which you want to allow an application.

Field Descriptions

Field	Description
Name	The name given to the preference. This name is what appears as an application choice for parents to select for their student. All names for this editor should be unique.
Code	An abbreviation given to the preference. All codes for this editor should be unique.
Program	Adding a Program to the Preference or selecting Flags that can be set on applications for the Preference allows the lottery process to handle special scenarios if needed.
Category	Categories may be set up to create groups for searches (Example: create an Elementary group so all Elementary school Preferences can be found quickly.)
School	The Schools listed are from the School Year attached to the selected Open Enrollment Configuration.
Calendar	The Calendars listed are from the selected School.
Structure	The Schedule Structures listed are from the selected Calendar.
On-time Start Date	The On-time Date Range will determine if the application will be considered on-time for the lottery and waitlist.
On-time End Date	The On-time Date Range will determine if the application will be considered on-time for the lottery and waitlist.
Application Window Start Date	The Application Window Date Range will determine when the Preference will be visible as an option.
Application Window End Date	The Application Window Date Range will determine when the Preference will be visible as an option.
Grades	Assigned Grades will be included as options when this Preference is selected in the Application. At least one Grade must be assigned.

Rules	Rules may be assigned and will be applied at run-time for the lottery or in the waitlist calculation. If no weight is set and the Rule does not inherit a weight, the logic will calculate it as a zero. Rules are optional.
Flags	Assigned Flags will be included as options when this Preference is selected in the Application. Flags are optional.

Creating a New Preference

1. Click **New**.
2. Enter all required information, including at least 1 Grade.
3. Add any Program, Category, Rules, or Flags as needed.
4. Click **Save**.

Save & Add Preference Assignments

Click Save & Add Preference Assignments to start the add process, then follow one of the options below:

Add a Grade

The Assigned Grades need to map back to existing grades in the Schedule Structure selected for the Preference. Not all grades need to be included. The Display Name is what parents will see when applying for a Preference and what will display in the Application.

1. Click Add Grade.
2. Select a Grade. The field maps the entry to an existing grade in Campus for the Schedule Structure selected. It is important to map this correctly as it is what will determine available seats. Grade mapping in the Preference must be unique.
3. Enter a Seat Count. The total number of seats available for this grade. It may be set later with this tool or with the Seat Count Editor tool.
4. Click Save. A grade will now appear in the Grades list. You can edit or delete it by selecting it in the list.

Add a Rule

Rules that are assigned will show up as options during processing for an Application for this Preference. They will be applied at run-time for the lottery or in the waitlist calculation. If no weight is set and the Rule does not inherit a weight from the Rules setup (Open Enrollment > Setup > Rules), the logic will calculate it as a zero.

1. Click Add Rule.
2. Select a Rule.
3. Enter a weight (if different than the default weight). If no weight is assigned, it will default to the default weight from the Rules setup tool (Open Enrollment > Setup > Rules) or zero if there is no default weight.
4. Enter a Sequence. This will determine the order in which the rules will be listed.
5. Click Save. The Rule will appear in the Rules list. You can edit or delete it by selecting it in the

list.

Add a Flag

Flags that are added to the Preference can be used during review of applications, running the lottery, or setting statuses of multiple applications.

1. Click Add Flag.
2. Select a Flag.
3. Enter a Sequence. This will determine the order in which the flags will be listed.
4. Click **Save**. The Flag will appear in the Flags list. You can edit or delete it by selecting it in the list.

Save & Import Preference Assignments

Click Save & Import Preference Assignments to start the import process, then follow one of the options below:

Import Grades

1. Click **Import Grades**. Grades will be imported from the selected template. Only Grades that do not already exist will be added.
2. Select Grade Template to Import.
3. Click Import Grades. The grades from the selected import will now appear in the Grades list. You can edit or delete a grade by selecting it in the list.

Import Rules

1. Click **Import Rules**. Rules will be imported from the selected template. Only Rules that do not already exist will be added.
2. Select a Rule Template to Import.
3. Click **Import Rules**. The rules from the selected import will now appear in the Rules list. You can edit or delete a rule by selecting it in the list.

Import Flags

1. Click **Import Flags**. Flags will be imported from the selected template. Only Flags that do not already exist will be added.
2. Select a Flag Template to Import.
3. Click **Import Flags**. The flags from the selected import will now appear in the Flags list. You can edit or delete a flag by selecting it in the list.

Export Templates

You can Export your Grades, Rules, or Flags setup as a template for use in other Preferences. When exported, these templates can be located in System Settings > Open Enrollment Templates under their designated template.

1. Click **Export Templates**.
2. Select Export Grades, Export Rules, or Export Flags.
3. Enter a name into the Select Template to Export field.
4. Click **Export**.