

MyEducation BC – SD71 - Elementary Scheduling

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1.0 Purpose

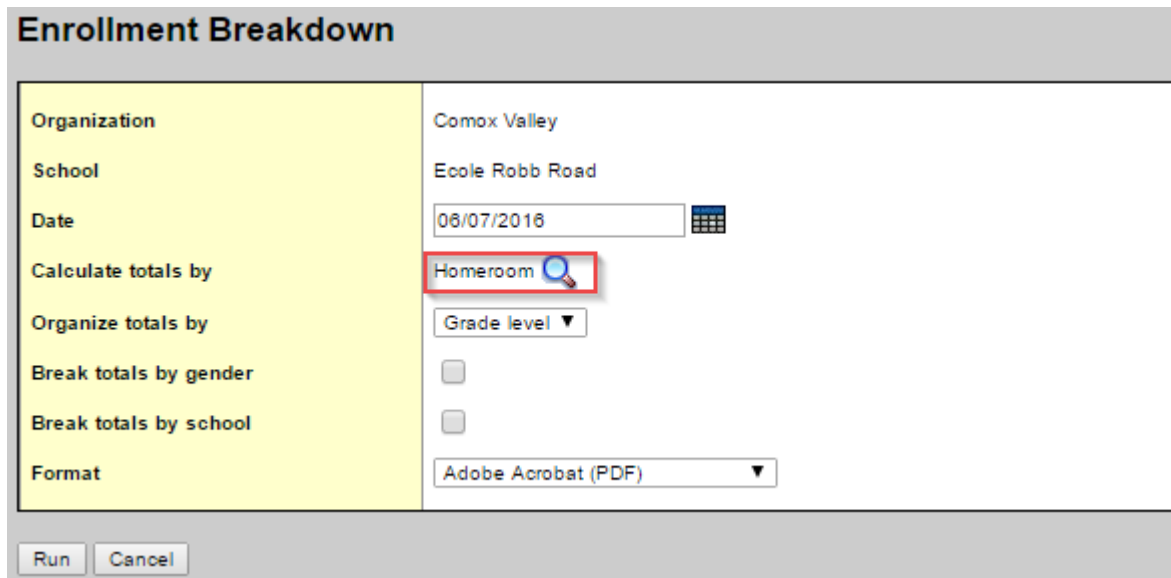
The purpose of this document is to provide information and instruction for setting up a next year master schedule for SD71 elementary schools.

2.0 Preparing for Build

Next year setup for students, teachers and courses will be done in the Build view. There are some tasks that will need to be completed so the necessary information is available in the Build view.

It is strongly advised that you print an **Enrollment Breakdown** report for the current year as a reference document.

1. In **School** view, select the **School** top tab.
2. **Reports** menu > **Enrollment Breakdown**.
3. Set **Calculate totals by** = Homeroom.



The screenshot shows the 'Enrollment Breakdown' configuration window. It has a yellow sidebar on the left with labels for various settings. The main area on the right contains the corresponding values and controls. The 'Calculate totals by' field is highlighted with a red box and a magnifying glass icon, showing 'Homeroom'. Below it, the 'Organize totals by' field is set to 'Grade level'. At the bottom, there are 'Run' and 'Cancel' buttons.

Organization	Comox Valley
School	Ecole Robb Road
Date	06/07/2016
Calculate totals by	Homeroom
Organize totals by	Grade level
Break totals by gender	<input type="checkbox"/>
Break totals by school	<input type="checkbox"/>
Format	Adobe Acrobat (PDF)

You will also want to have your new enrollment grid available during this process.

2.1 Staff in the School View

The Build view will look at the existing staff records in the **School** view > **Staff** top tab. If additional staff are required for next year course sections, please contact the IT Help Desk (ithelpdesk@sd71.bc.ca) to have them added to your school for next year.

2.2 Courses

2.2.1 School Course Catalogue

School course catalogues need to be copied to the next year.

1. In **School** view, select the **Schedule** top tab.
2. Click on the Courses side tab.
3. Click **Options** menu > **Copy Course Catalog**.
4. **Copy from** = current school year (2015-2016), **Copy to** = next school year (2016-2017)
5. Do not check Replace existing.
6. Select **Copy all**.

The screenshot shows a dialog box with two main sections: 'Catalog' and 'Courses'. In the 'Catalog' section, there are two dropdown menus: 'Copy from' (set to '2015-2016') and 'Copy to' (set to '2016-2017'). Below these is a checkbox for 'Replace existing' which is unchecked. The 'Courses' section has three radio buttons: 'Copy all' (which is selected), 'Selection', and 'Snapshots'. Below the radio buttons is a text field labeled 'Selected courses:' containing the number '85'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

7. Click **OK**. This will copy the courses from the current year to next year.

2.3 Rooms

Rooms that are currently in the school will appear in the Build view when a scenario is created.

To review room information:

1. In the **School** view, select the **Schedule** top tab.
2. Click on the Rooms side tab. Review the rooms available.
3. In the **Options** menu, select **Add** to create additional rooms, if necessary.
 - a. **Number**: Enter the room identifier.
 - b. **Include in scheduling**: Check this box if the room needs to be available for selection when creating or modifying the information on a course section.
 - c. All other fields are optional.

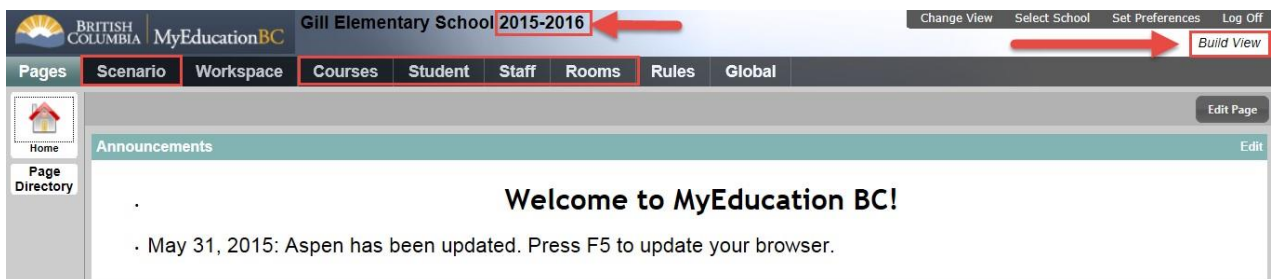
3.0 The Build View

The Build view is the area in MyEducation BC where schools can prepare their schedule structure and setup for their next school year. This view contains information on students, staff, courses and rooms.

In the context of an Elementary school the Build View can be used to create the next year course sections. This can be done by copying the current year structure and schedule into the Build view, or by creating a new structure within the Build view.

To access the **Build** view:

1. In the **School** view, select **Change View** on the *Settings Bar*.
2. Select **Build**.



- Ensure the school name at the top shows the next school year.
- Notice the application background colour has changed and the Build view is indicated in the upper right corner below the *Settings* bar.
- Note that top tab selections are different from the School view.

3.1 Creating a Scenario

Build view > **Scenario** top tab

Scenarios define the structure of the master schedule.

To create a scenario as a copy of the current schedule:

1. In the **Build** view, select the **Scenario** top tab.
2. In the **Options** menu, select **Copy Active Schedule**.
3. Populate the fields as follows:
 - a. **New scenario name:** give the scenario a name that makes sense to the user.
 - b. **Items to include: Master Schedule:** check this box to copy the master schedule and all sections from the current year.

New scenario name: Copy of 2014 Schedule - AO

Items to include:

- Master schedule:
- Clear platoon code:
- Student schedules:
- Rules:

** Time structure and schedule attributes will be copied automatically.

OK Cancel

4. Click **OK**. The scenario will now appear in the list.

Name	Start	End	Term	DPC	PPD
Copy of 2014 Schedule - AO	8/1/2015	7/31/2016	1/1	1	2
Test 1	8/1/2015	7/31/2016	1/1	0	0

5. Click into the Scenario Details.
6. Click **SAVE**.

3.1.1 Terms

Scenario top tab > Select scenario > **Terms** side tab

Confirm that there is one full year schedule term in this screen.

The screenshot shows the 'Terms' side tab selected. The main content area displays a table with the following data:

Code	Name
<input type="checkbox"/> FY	FY

Other visible elements include the 'Scenarios' header with 'Copy of 2014 Schedule', a 'Details' sidebar, and a '0 of 1 selected' indicator.

3.1.2 Days

Scenario top tab > Select scenario > **Days** side tab

Elementary schools that are using the period-based attendance model with the ATT—AM and ATT—PM courses will require days in the school.

- If the school is currently using period-based attendance in the current year and has created the scenario by copying the current active schedule, then the **Day** value will have been copied over. Confirm that it is in place.

The screenshot shows the 'Days' side tab selected. The main content area displays a table with the following data:

Number	ID	Name
<input type="checkbox"/> 1	1	Day 1

Other visible elements include the 'Scenarios' header with 'Copy of 2014 Schedule', a 'Details' sidebar, and a '0 of 1 selected' indicator.

3.1.3 Periods

Scenario top tab > Select scenario > **Periods** side tab

Elementary schools that are using the period-based attendance model with the ATT—AM and ATT—PM courses will require periods in the school.

- If the school is currently using period-based attendance in the current year and has created the scenario by copying the current active schedule, then the **Period** value(s) will have been copied over. Confirm that they are correct.

The screenshot shows the 'Periods' side tab interface. At the top, there are navigation tabs: Pages, Scenario, Workspace, Courses, Student, Staff, Rooms, Rules, and Global. Below these are sub-tabs: Options, Reports, and Help. The 'Scenarios' dropdown menu is open, showing 'Copy of 2014 Schedule' selected. Below the dropdown, there is a table with columns: Number, ID, Name, and Scheduled?. The table contains two rows: 1 (AM) and 2 (PM), both with 'Scheduled?' set to 'Y'. The 'Periods' side tab is highlighted in the left sidebar.

Number	ID	Name	Scheduled?
1	AM	AM	Y
2	PM	PM	Y

3.2 Courses

Build view > **Courses** Top tab

Courses that have been added to the school course catalogue through the Build Year in the school view will appear in this list (see section 2.6). The following sub-sections include information on adding and removing courses for the Build view and their attributes.

3.2.1 Adding and Removing Courses from the Build View

The course list should be reviewed to ensure all courses are in the list for use. Common scenarios are listed in the table below if a user identifies courses that are not showing in the list.

Problem	Resolution	Path
<p>Course is in the School view list under Build Year, but does not show in the Build View > Courses list</p>	<ol style="list-style-type: none"> 1. Check if the course is marked to "Include in scheduling" 2. Refresh the course list in the Build view 	<ol style="list-style-type: none"> 1. Build view > Courses top tab <ul style="list-style-type: none"> • Set filter to All Records • Set field set to Required Crs Fields • Check the Schd? Field. If set to N, click into the detail of the course and check the box for "Include in Scheduling" 2. Build view > Courses top tab <ul style="list-style-type: none"> □ Options > Refresh
<p>Course was added to the Build view > Courses in error and cannot be deleted.</p>	<p>Courses can be added to the Build view, but must be deleted through the School view.</p>	<p>School view > Schedule top tab</p> <ul style="list-style-type: none"> • Courses side tab > set filter to Build Year • Check the box beside the course to be deleted. • Options > Delete

3.2.2 Course Attributes in the Build View

Build view > **Courses** top tab > **Elementary Required Fields** field set The

only fields that are necessary for elementary schedule building are:

- **Include in scheduling:** This should be checked by default when the current active schedule was copied in the scenario. Double-check this field if the course is required for scheduling but is not appearing in the list.
- **Section enrollment max:** This is optional and will not be observed when using group scheduling functions. However, when enrolling additional students throughout the school year, setting this maximum would warn the user that the section is already full.

These fields can be updated from the course list screen using either Mass Update or Modify List options.

CrsNo	Description	Schd?	EnrMax
ATT--AM	AM Attendance	Y	30
ATT--PM	PM Attendance	Y	30

3.3 Staff in the Build View

Build view > **Staff** top tab

Staff members cannot be added or deleted in the Build view.

The Staff top tab will display staff members who were in the School, when the scenario was created.

If staff do not appear, refresh the list.

To refresh list:

1. **Build** view > **Staff** top tab.
2. Set the filter to **All Records**.
 - a. Check if the staff member now appears, but has their **Schd?** Field set to “N”. Click into the detail of the staff record and check the box for **Include in scheduling**.
 - b. If the staff member still does not appear, proceed to Step 3 below.
3. In the **Options** menu, select **Refresh**.

3.3.1 Staff Attributes in the Build View

The only fields that are necessary for elementary schedule building are:

- **Include in scheduling:** check this box if this staff member needs to be in the list to assign to a course section.
- **Classroom > Number:** this field is optional, but if a classroom is assigned to a specific teacher, it can be assigned here.

These fields can be updated from the staff list screen using either Mass Update or Modify List options.

Pages	Scenario	Workspace	Courses	Student	Staff	Rooms	Rules	Global
Options	Reports	Help						
Staff								
Details	1:Alkema, Carrie				0 of 66 selected			
Assignments	<input type="checkbox"/>	Name	Type	Department	Schd?		Classroom > Num	
Licenses	<input type="checkbox"/>	Alkema, Carrie	Teacher		Y		101	
Schedule	<input type="checkbox"/>	Austerberry, Laura	Teacher		Y		102	
	<input type="checkbox"/>	Berkeley, Alex	Teacher		Y		103	

3.4 Students

Build view > Student top tab

The **Student** top tab in the Build view will show the students available for next year scheduling. If the correct number of students does not display, go to the **Options** menu and select **Refresh**. This will refresh the list with the latest information of students with next school values for this school.

The following filters and field sets have been created to assist with grouping students and viewing the appropriate fields.

- Elem – with Hrm info – Field Set
- Elem – Current Hrm Contains ? - Filter
- Elem – Nxt Hrm Contains ? – Filter

3.4.1 Student Attributes in the Build View

- **Include in scheduling:** check this box if this student needs to be in the list to assign to a course section.
- **Next Homeroom:** this field is optional but can be populated for the purposes of organizing next year students. If the field is populated in the Build view, it will appear automatically in the School view and vice-versa. A mass update procedure can be used to copy the Next Homeroom value to the Homeroom field after end-of-year rollover.

4.0 Using the Workspace

The **Workspace** top tab displays the sections and section information that was copied over when the scenario was created, from the current year active schedule.

This is where the school can add or remove sections, and modify the information on sections.

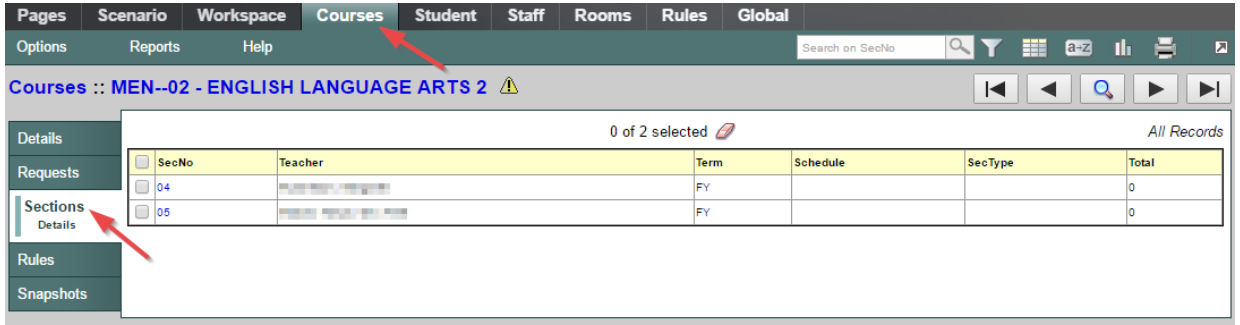
The following filters and field sets have been created to assist with viewing and updating records in the workspace.

- Elem – Section Detail – Field Set
- Elem – Section # = ? - Filter

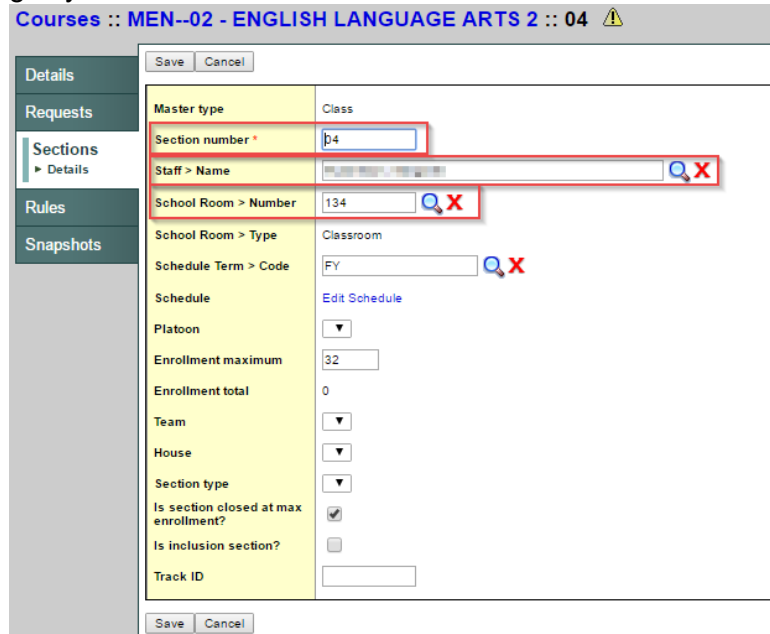
4.1.1 Adding/Modifying/Deleting information on sections

Build view > Courses top tab

1. Using the Grade = ? filter, enter the grade you want to work with (e.g. 02).
2. Click on the first course name listed.
3. Select the Sections side tab.



4. Using your staff/division grid as reference, you may need to adjust the section number and/or teacher for the specific sections. Click on the Section Number to adjust any of these details. The **Scheduling Section Changes – worksheet** document is recommended for planning the changes you'll need to make.



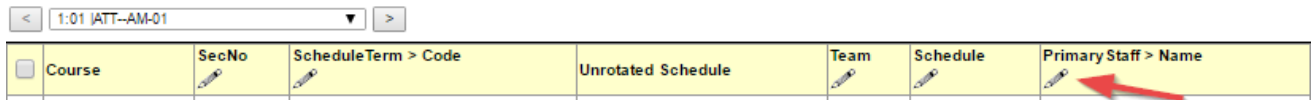
5. Use the VCR buttons to navigate forwards and backwards through the other grade filtered courses and make similar adjustments.



4.1.2 Assigning Teachers

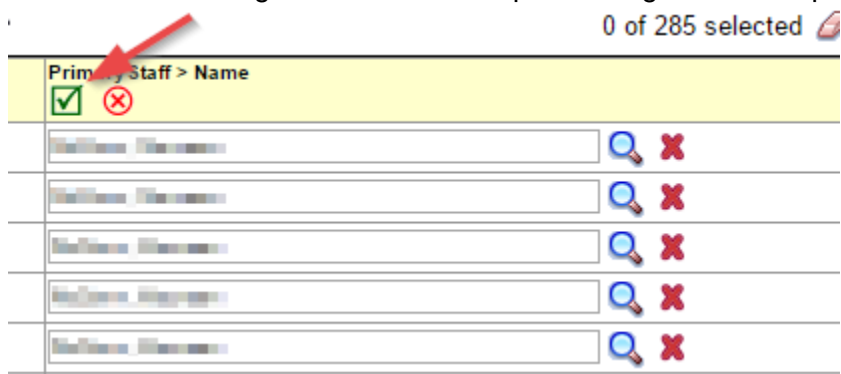
Build view > **Workspace** top tab

1. Sort by **SecNo** column by clicking on the column header.
2. **Options** menu > **Modify List**.
3. Click on the pencil underneath Primary Staff > Name.



Course	SecNo	ScheduleTerm > Code	Unrotated Schedule	Team	Schedule	Primary Staff > Name
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4. You can type in the teacher's name starting with last name, it will auto-fill this field as you type.
5. You must click the green check before proceeding to the next page.



0 of 285 selected

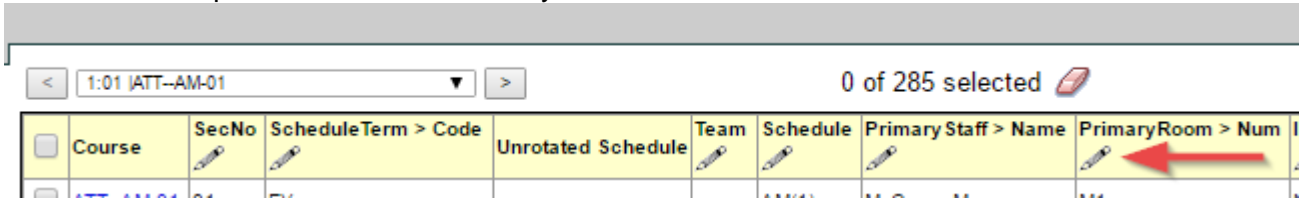
Primary Staff > Name
<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="text"/> <input type="button" value="🔍"/> <input type="button" value="✖"/>
<input type="text"/> <input type="button" value="🔍"/> <input type="button" value="✖"/>
<input type="text"/> <input type="button" value="🔍"/> <input type="button" value="✖"/>
<input type="text"/> <input type="button" value="🔍"/> <input type="button" value="✖"/>
<input type="text"/> <input type="button" value="🔍"/> <input type="button" value="✖"/>

6. When complete, click **Options** menu > **Modify List** to turn off this function.

4.1.3 Assigning Rooms

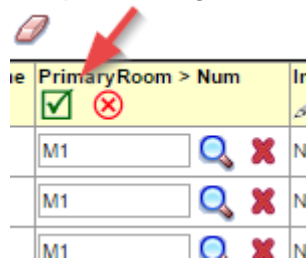
Build view > **Workspace** top tab

1. Sort by **Primary Staff > Name** column by clicking on the column header.
2. **Options** menu > **Modify List**.
3. Click on the pencil underneath Primary Room > Num.



Course	SecNo	ScheduleTerm > Code	Unrotated Schedule	Team	Schedule	Primary Staff > Name	PrimaryRoom > Num

4. You can type in the room number.
5. You must click the green check before proceeding to the next page.



PrimaryRoom > Num	In
<input checked="" type="checkbox"/> <input type="checkbox"/>	
M1 <input type="text"/>	N
M1 <input type="text"/>	N
M1 <input type="text"/>	N

6. When complete, click **Options** menu > **Modify List** to turn off this function.

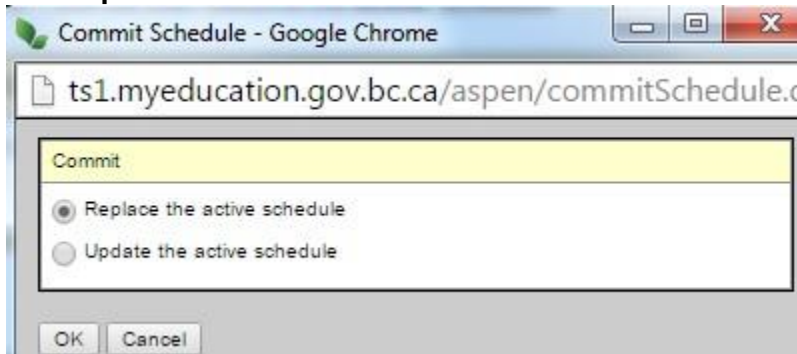
5.0 Committing a Schedule

After the **End of Year Rollover (EYOR)** process is complete, one **Scenario** from the Build view must be **Committed** – this will then become the **Active Schedule**.

5.1 Commit Schedule

In the Build view:

1. Click the **Scenario** tab.
2. Select the **Scenario** that you would like to commit, to go into the **Details**.
3. Click **Options > Commit Schedule...** ... The Commit Schedule dialog box appears:



4. Select the appropriate option, **Replace the active schedule** or **Update the active schedule** (if you have already committed the schedule, made changes and want to only re-commit the changes).

6.0 Loading Students into Sections

The loading of student into sections will be done once you commit a schedule scenario in August after End of Year Rollover is complete. School clerical staff can be assigned this task, and using snapshots can assign students to their correct classes.