



## Scheduling Individual Students

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## 1.0 Student Scheduling

This guide provides instruction for scheduling students into classes in a middle or high school. Content includes the items below. Please refer to the videos created to accompany this guide for additional details and tips.

- Scheduling a new student
- Making changes to a student schedule

There are two different *views* that can be used to schedule students. There is a small blue hyperlink in the top right corner of the scheduling screen to toggle between the two views.

**Matrix view:** presents the students classes as a matrix grid.

Options ▾ Reports ▾ Help ▾

Course Requests

Course: Primary Allow over max:

- MAWM-11 APPRENTICESHIP AND WORKPLACE MATH 11
- MEN-11 ENGLISH 11
- MEN-12 ENGLISH 12
- MESC-11 EARTH SCIENCE 11
- MFM-12 FAMILY STUDIES 12
- MFNS-12 BC FIRST NATIONS STUDIES 12
- MFORM-11 FOUNDATIONS OF MATHEMATICS 11
- MFORM-11 FOUNDATIONS OF MATHEMATICS 11
- MGT-11 GRADUATION TRANSITIONS
- MLAW-12 LAW 12
- MPE-11H PHYSICAL EDUCATION 11-Healthy Lifestyles
- MSJ-12 SOCIAL JUSTICE 12
- MSS-11 SOCIAL STUDIES 11
- MVMAT12 VISUAL ARTS: MEDIA ARTS 12
- MWEX-2A WORK EXPERIENCE 12A

Alternate

Show courses excluded from scheduling

Number:  Add

Select Drop All Update

Printer Friendly Version

View and make changes as of 03/08/2017

Student Schedule (50% scheduled - Class credits: 36.0)

Term code: FY Work mode: Manual

1 [S1] MESC-11-01 EARTH SCIENCE 11 McDonald, J 221 X

1 [S2] MAWM-11-02 APPRENTICESHIP AND WORKPLACE MATH 11 Haynes, D 215 X

2 [S1] MWEX-2A-02 WORK EXPERIENCE 12A Cooper, M 311 X

2 [S2] MEN-12-01 ENGLISH 12 Hornsby, C 302 X

3 [S1] MEN-11-02 ENGLISH 11 Williams, W 314 X

3 [S2] MSJ-12-01 SOCIAL JUSTICE 12 Russell, M 204 X

4 [S1] MFM-12-02 FAMILY STUDIES 12 Hornsby, C 302 X

<< List view

Use this hyperlink to toggle between the List view and Matrix view. Either view can be used to schedule a student.

**List view>>:** presents the student's classes as a list.

View and make changes as of 03/08/2017

Student Schedule (50% scheduled - Class credits: 36.0)

0 of 10 selected

Course	Description	Term	Schedule	Unrotated Schedule	Teacher	Classm	SecType	Effective Date
<input type="checkbox"/> MESC-11-01	EARTH SCIENCE 11	S1	1(1)		McDonald, Josh	221		<input type="checkbox"/>
<input type="checkbox"/> MAWM-11-02	APPRENTICESHIP AND WORKPLACE MATH 11	S2	1(1)		Haynes, Dighton	215		<input type="checkbox"/>
<input type="checkbox"/> MWEX-2A-02	WORK EXPERIENCE 12A	S1	2(1)		Cooper, Megan	311	N	<input type="checkbox"/>
<input type="checkbox"/> MEN-12-01	ENGLISH 12	S2	2(1)		Hornsby, Claudette	302	N	<input type="checkbox"/>
<input type="checkbox"/> MEN-11-02	ENGLISH 11	S1	3(1)		Williams, Wendy	314	N	<input type="checkbox"/>
<input type="checkbox"/> MSJ-12-01	SOCIAL JUSTICE 12	S2	3(1)		Russell, Mikael	204	N	<input type="checkbox"/>
<input type="checkbox"/> MFM-12-02	FAMILY STUDIES 12	S1	4(1)		Hornsby, Claudette	302	N	<input type="checkbox"/>
<input type="checkbox"/> MFNS-12-03	BC FIRST NATIONS STUDIES 12	S2	4(1)		McKinnigan, Cameron	309	N	<input type="checkbox"/>
<input type="checkbox"/> MGT-11-03	GRADUATION TRANSITIONS	S1	NO ATT(1)		Bryant, Loni	NONE	N	<input type="checkbox"/>
<input type="checkbox"/> XDPA-12-01	DAILY PHYSICAL ACTIVITY 12	FY			Rourke, Carla		N	<input type="checkbox"/>

Course:  Ignore warnings Add

Select Drop Reschedule Post Revert

Pending Student Schedule Changes

Type	Effective Date	Course	Description	Term	Schedule	Teacher	Classm
No matching records							

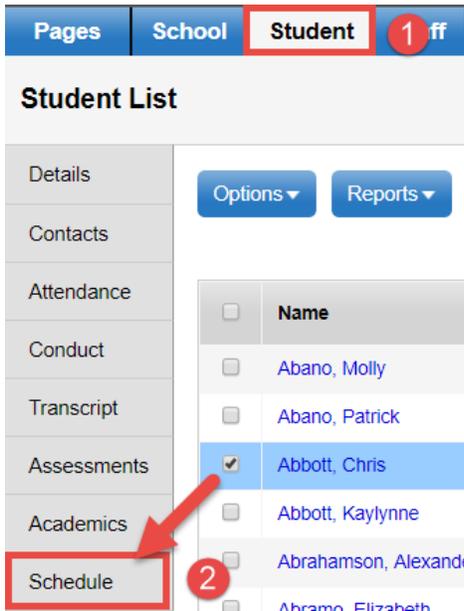
Course Requests

Show courses excluded from scheduling

Number	Description	SecType	SecNo	TPYView	Periods per cycle	Staff > Name	TermCode	TermContent	Alternate?	Priority	Inclusion?	Alt 1 > CrsNo	Alt 2 > CrsNo	Allow over max
<input type="checkbox"/> MAWM-11	APPRENTICESHIP AND WORKPLACE MATH 11			1/2	1.0000				N	0	N			<input type="checkbox"/>
<input type="checkbox"/> MEN-11	ENGLISH 11			1/2	1.0000				N	0	N			<input type="checkbox"/>
<input type="checkbox"/> MEN-12	ENGLISH 12			1/2	1.0000				N	0	N			<input type="checkbox"/>
<input type="checkbox"/> MESC-11	EARTH SCIENCE 11			1/2	1.0000				N	0	N			<input type="checkbox"/>

## 2.0 Scheduling a Student Using the Matrix View

1. In the **Student** top tab, check the box beside the student to schedule.
2. Click the **Schedule** side tab.

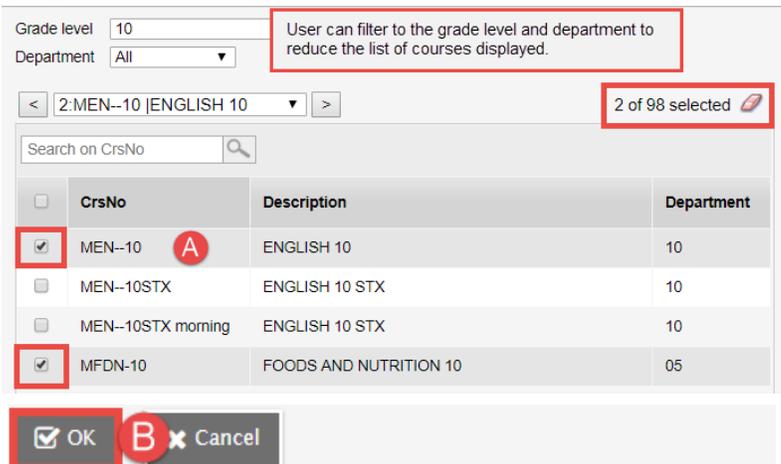


3. Click the **Workspace** sub-side tab. Ensure the view shows the classes as a matrix grid. The blue hyperlink in the upper right corner will say << List view. This means the Matrix view is being displayed.

**View and make changes as of:** allows the user to select a future date when scheduling students who are not starting classes immediately. Any schedule changes made with a future date will appear in the **Pending Student Schedule Changes** section.

The **Course Requests** section is used to select the courses that the student requires in the schedule. The system may place the student in any section of the selected course codes.

1. Use the **Select** button to generate a pop-up list of courses available in the school.
  - a. Find and check the box beside the courses required.
  - b. Click **OK**.



2. This will place a list of student course requests on the student scheduling screen.
  - a. If one of the course codes selected is an alternate, click and drag the code to the **Alternate** section of the screen. The system will try to schedule **Primary** courses first.
  - b. **Allow over max** checkboxes can be used to allow the system to schedule more students into a class than are normally allowed. Due to class size restrictions, this is not recommended.

Course Requests		
Course	Primary	Allow over max
<b>X</b> MEN--10 ENGLISH 10	<input type="checkbox"/>	<input type="checkbox"/>
<b>X</b> MFMP-10 FOUNDATIONS OF MATH AND PRE-CALCULUS 10	<input type="checkbox"/>	<input type="checkbox"/>
<b>X</b> MMCB-10Y MUSIC 10: CONCERT BAND YEAR LONG	<input type="checkbox"/>	<input type="checkbox"/>
<b>X</b> MPE--10 PHYSICAL EDUCATION 10	<input type="checkbox"/>	<input type="checkbox"/>
<b>X</b> MPLAN10 PLANNING 10	<input type="checkbox"/>	<input type="checkbox"/>
<b>X</b> MSC--10 SCIENCE 10	<input type="checkbox"/>	<input type="checkbox"/>
<b>X</b> MSLGX10 SM'ALGYAX 10	<input type="checkbox"/>	<input type="checkbox"/>
<b>X</b> MSS--10 SOCIAL STUDIES 10	<input type="checkbox"/>	<input type="checkbox"/>
Alternate		
<b>X</b> MTEW-10 TECHNOLOGY EDUCATION 10:WOODWORK	<input type="checkbox"/>	<input type="checkbox"/>

3. On the right side of the screen, below the schedule matrix, click the **Reschedule** button. If using alternates, check the **Use alternates** box in the pop-up window. The system will attempt to place the student into all of the classes for the courses requests selected.

Printer Friendly Version

View and make changes as of 8/30/2017

<< List view

Student Schedule (56% scheduled - Class credits: 36.0)

Term code	Work mode	Allow conflicts	Allow all over max
FY	Manual	<input type="checkbox"/>	<input type="checkbox"/>

1		
1	[S1] MSS--10-03 SOCIAL STUDIES 10 Bastion, G 303	<b>X</b> ⚙
	[S2] MEN--10-01 ENGLISH 10 Mycroft, L 312	<b>X</b> ⚙
2	[S1] MPE--10-04 PHYSICAL EDUCATION 10 North, D 103C	<b>X</b> ⚙
	[S2] MTEW-10-01 TECHNOLOGY EDUCATION 10:WOODWORK Douglas, J 102	<b>X</b> ⚙
3	[S1] MFMP-10-03 FOUNDATIONS OF MATH AND PRE-CALCULUS 10 Bronson, K 208	<b>X</b> ⚙
	[S2] MPLAN10-02 PLANNING 10 Palmer, T 104	<b>X</b> ⚙
4	[S1] MSC--10-05 SCIENCE 10 Young, J 220	<b>X</b> ⚙
	[S2] MSLGX10-01 SM'ALGYAX 10 Clarkson, F 301	<b>X</b> ⚙

4. Set the **Term code** drop-down to **FY** to view all classes, regardless of their schedule term. Determine which courses did not get scheduled.
  - a. **Course Requests** on the left that have the code in bold lettering did not get scheduled.
    - i. Hover over the course code and the grid will show where there are classes for that course code.

**Course Requests**

Course	Primary	er max
<b>X</b> <b>MEN--10 ENGLISH 10</b>		<input type="checkbox"/>
<b>X</b> MFMP-10 FOUNDATIONS OF MATH AND PRE-CALCULUS 10		<input type="checkbox"/>
<b>X</b> MMCB-10Y MUSIC 10: CONCERT BAND YEAR LONG		<input type="checkbox"/>

- ii. Courses can be clicked and dragged into, out of, or within the grid to place them in different spots.
- iii. The red X beside a class in the grid will remove it from the grid and place it back under *Course Requests* in bold as an unscheduled request.
- iv. The padlock beside a class in the grid allows the user to lock that class into its spot and then click Reschedule to try to place other classes around it.

[S1] MPE--10-04  
 PHYSICAL EDUCATION 10  
 North, D  
 103C



- v. Click on blank periods in the grid to see what classes are offered in that period.

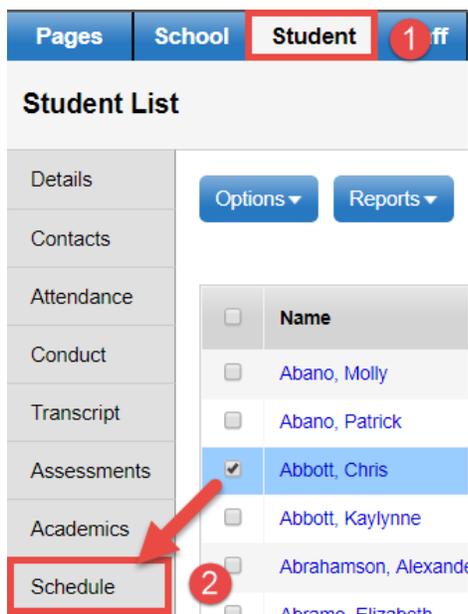
- b. Add, move or remove classes until the student has a suitable schedule.

5. Click **Post** to make the student schedule permanent.

Course    Ignore warnings

### 3.0 Scheduling a Student Using the List View

1. In the **Student** top tab, check the box beside the student to schedule.
2. Click the **Schedule** side tab.



3. Click the **Workspace** sub-side tab. Ensure the view shows the classes as a list. The blue hyperlink will say *Matrix view*. This means the List view is being displayed.

View and make changes as of 8/30/2017

Student Schedule (44% **This is list view** Credits: 28.0) 0 of 8 selected

<input type="checkbox"/>	Course	Description	Term	Schedule	Unrotated Schedule	Teacher	Classrm	SecType	Team
<input type="checkbox"/>	MPE--10-04	PHYSICAL EDUCATION 10	S1	2(1)		North, Diane	103C		
<input type="checkbox"/>	MTEW-10-01	TECHNOLOGY EDUCATION 10:WOODWORK	S2	2(1)		Douglas, John	102		
<input type="checkbox"/>	MFMP-10-03	FOUNDATIONS OF MATH AND PRE-CALCULUS 10	S1	3(1)		Bronson, Kyle	208		

**View and make changes as of:** allows the user to select a future date when scheduling students who are not starting classes immediately. Any schedule changes made with a future date will appear in the **Pending Student Schedule Changes** section.

The **Course Requests** section is used to select the courses that the student requires in the schedule. The system may place the student in any section of the selected course codes.

3. Use the **Select** button to generate a pop-up list of courses available in the school.
  - a. Find and check the box beside the courses required.
  - b. Click **OK**.

<input type="checkbox"/>	CrsNo	Description	Department
<input checked="" type="checkbox"/>	MEN--10	ENGLISH 10	10
<input type="checkbox"/>	MEN--10STX	ENGLISH 10 STX	10
<input type="checkbox"/>	MEN--10STX morning	ENGLISH 10 STX	10
<input checked="" type="checkbox"/>	MFDN-10	FOODS AND NUTRITION 10	05

4. A pop-up will appear listing a grade level, a department pick list and the list of all courses that match the corresponding grade level/department chosen. Check the checkboxes beside each course that the student is interested in/required to take during the school year. Allow for alternates. When you are finished, click the **OK** button.

<input type="checkbox"/>	CrsNo	Description
<input type="checkbox"/>	MAC--11	ACCOUNTING 11
<input type="checkbox"/>	MAC--11--	ACCOUNTING 11
<input type="checkbox"/>	MAF--11	ART FOUNDATIONS 11
<input type="checkbox"/>	MAT--11	AUTOMOTIVE TECHNOLOGY 11
<input type="checkbox"/>	MAWM-11	APPRENTICESHIP AND WORKPLACE MATH
<input type="checkbox"/>	MAWM-11-DL	APPRENTICESHIP AND WORKPLACE MATH
<input type="checkbox"/>	MAWM-11MOD	APPRENTICESHIP AND WORKPLACE MATH
<input type="checkbox"/>	MBCA-11	BUSINESS COMPUTER APPLICATIONS 11
<input type="checkbox"/>	MBCA-11-DL	BUSINESS COMPUTER APPLICATIONS 11
<input type="checkbox"/>	MBI--11	BIOLOGY 11

5. Click the **Reschedule** button in the Student Schedule section to have the system place as many course requests into classes as possible. Course requests that do not get scheduled will appear in bold in the *Course Requests* section of the screen.

### Course Requests

<input type="checkbox"/>	Number	Description
<input type="checkbox"/>	MEN--10	<b>ENGLISH 10</b> <a href="#">Add...</a>
<input type="checkbox"/>	MFMP-10	FOUNDATIONS OF MATH AND PRE-CALCULUS 10
<input type="checkbox"/>	MMCB-10Y	MUSIC 10: CONCERT BAND YEAR LONG
<input type="checkbox"/>	MPE--10	PHYSICAL EDUCATION 10

Not scheduled

6. The **Student Schedule** section at the top of the screen will be populated with all the classes that were scheduled for the student.
  - a. Click the **Term** header to sort the classes by schedule term.
  - b. Check the **Schedule** column to see where the student has periods used for each schedule term.
  - c. Check the **Lock** box beside a class allows the user to lock that class in place and use the Rechedule button to place classes differently.
  - d. Use the **Select** button to add or remove classes until the student has a suitable schedule.
7. Click **Post** to make the schedule permanent.

**Student Schedule** 44% scheduled - Class credits: 28

<input type="checkbox"/>	Course	Description	Term ▲	Schedule
<input type="checkbox"/>	MMCB-10Y-01	MUSIC 10: CONCERT BAND YEAR LONG	FY	8(1)
<input type="checkbox"/>	XDPA-10-01	DAILY PHYSICAL ACTIVITY 10	FY	
<input type="checkbox"/>	MPE--10-04	PHYSICAL EDUCATION 10	S1	2(1)
<input type="checkbox"/>	MFMP-10-03	FOUNDATIONS OF MATH AND PRE-CALCULUS 10	S1	3(1)
<input type="checkbox"/>	MSC--10-05	SCIENCE 10	S1	4(1)
<input type="checkbox"/>	MTEW-10-01	TECHNOLOGY EDUCATION 10:WOODWORK	S2	2(1)
<input type="checkbox"/>	MPLAN10-02	PLANNING 10	S2	3(1)
<input type="checkbox"/>	MSLGX10-01	SM'ALGYAX 10	S2	4(1)

Course   Ignore warnings

## 4.0 Dropping Classes from the Student Schedule

**It is critical for TRAX that transcript records for a dropped course are either updated or finalized!**

- A transcript record can be “updated” when a student is moved from one section to another section with the same course code.
- A record must be “finalized” when the student is dropped from the section after grades or course dates have been posted. Appendix A of this document provides instruction on how to finalize a transcript record.

1. In the **Student** top tab, check the box beside the student to schedule.
2. Click the **Schedule** side tab.
3. Click the **Workspace** sub-side tab.
  - a. In the List view, check the box beside the class to be dropped and click the **Drop** button.
  - b. In the Matrix view, click the red X beside the class in the grid to be dropped.
  - c. If a class is being replaced with another section of the same course code, the user may be prompted to **Update transcripts to new section**.
    - i. Check the Update box.
    - ii. Click **OK**. **This prevents orphaned transcript records when grades have already been posted for the original section of the course.**

### Update transcripts to new section

Current transcript record	New transcript record	Update
MPE--10-04 PHYSICAL EDUCATION 10	MPE--10-05 PHYSICAL EDUCATION 10	<input checked="" type="checkbox"/>

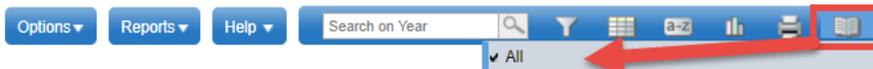
4. In the **Course Requests** section of the screen, click the **Update** button so the course requests reflect the same course codes as the grid.
5. Click **Post** to make the changes permanent.

**Note:** A record of adds/drops is kept in the Change History side tab each time a student timetable is posted. This allows the user to see what activity has occurred on the student’s schedule.

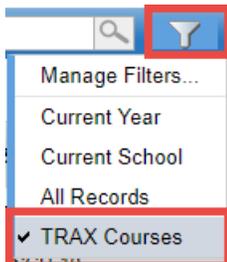
## Appendix A – Finalizing Transcript Records

This is a review of the fields that must be populated for a transcript record to be properly processed by TRAX.

1. **Student** top tab > check the box beside the student to check.
2. **Transcript** side tab > set the dictionary menu icon to **All**



3. Set the filter to **TRAX Courses**



4. Set the field set  icon to **TRAX Quick Check**. Look for missing TRAX data:
  - a. **Final**: TRAX needs a final mark to consider a course complete.
  - b. **Prov Exam**: If the course is examinable, there must be a provincial exam mark.
  - c. **Blended**: If the course is examinable, there must be a blended mark. This represents the “true” final mark for the course, being a result of the school final % and the provincial exam %.
  - d. **Credit**: Course must have a valid credit value for TRAX to consider the course complete.
  - e. **TRAX**: This is the TRAX Override field, which is only populated if the course is an examinable course but the student came from out of jurisdiction and will not be writing it.
  - f. **Crs StartDate** and **CourseEndDate**: Populate a course start date and end date that is consistent with the year in which the student took the course.
  - g. **Completion Date**: TRAX requires a completion date consistent with the year in which the student took the course. *If the completion date is blank, the course will not get credit!*
  - h. **IDS Related Course**: Independent directed study course that start with an **MIDS**, must have a course code selected in the **IDS Related Course** field.
    - **Note**: This field cannot be displayed in the field set so it is necessary to click into the detail of each MIDS class and ensure that the IDS Related Course field is populated with a valid Ministry course code.
5. Click the blue hyperlink on the **Year** column to edit a record with missing data. Be sure to click **Save** after making changes.