School District 8
Kootenay Lake

Scheduling Individual Students

Date modified: April 1, 2019

Contents

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.

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

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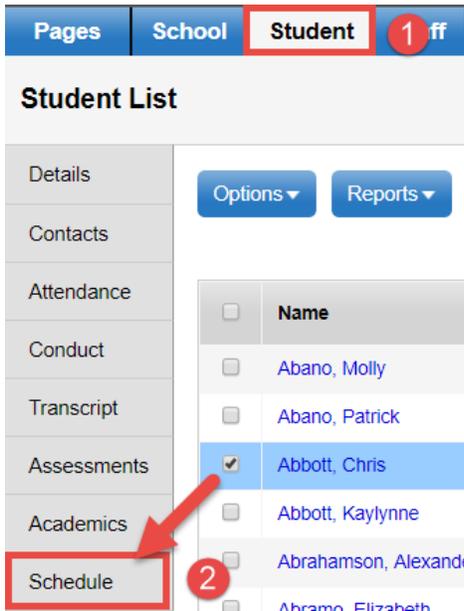
3. Click the **Workspace** sub-side tab. Ensure the view shows the classes as a matrix grid. The blue hyperlink in the upper right corner will say << *List view*. This means the Matrix view is being displayed.

    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**.
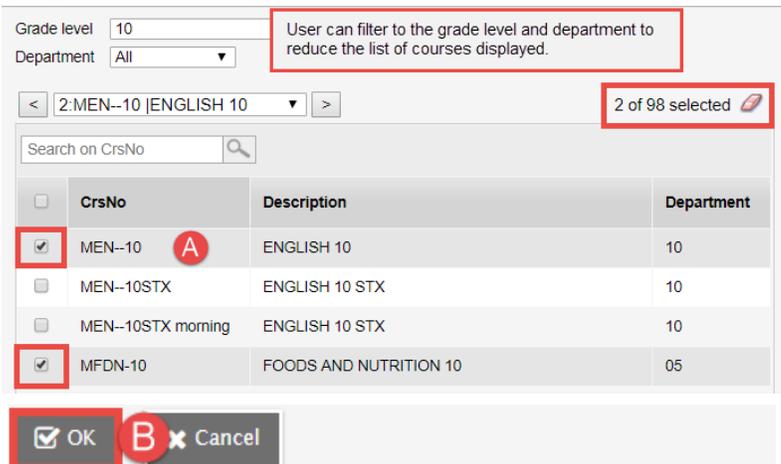
2. This will place a list of student course requests on the student scheduling screen.
   a. If one of the course codes selected is an alternate, click and drag the code to the **Alternate** section of the screen. The system will try to schedule **Primary** courses first.
   b. **Allow over max** checkboxes 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	Allow over max
Primary	
✗ **MEN--10 ENGLISH 10**	☐
✗ **MFMP-10 FOUNDATIONS OF MATH AND PRE-CALCULUS 10**	☐
✗ **MMCB-10Y MUSIC 10: CONCERT BAND YEAR LONG**	☐
✗ **MPE--10 PHYSICAL EDUCATION 10**	☐
✗ **MPLAN10 PLANNING 10**	☐
✗ **MSC--10 SCIENCE 10**	☐
✗ **MSLGX10 SM'ALGYAX 10**	☐
✗ **MSS--10 SOCIAL STUDIES 10**	☐
Alternate	
✗ MTEW-10 TECHNOLOGY EDUCATION 10:WOODWORK	☐

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 | FY ▼ | Work mode | Manual ▼ | Allow conflicts ☐ | Allow all over max ☐ |

1

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

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		er max
	Prima...	
✗	**MEN--10 ENGLISH 10**	☐
✗	MFMP-10 FOUNDATIONS OF MATH AND PRE-CALCULUS 10	☐
✗	MMCB-10Y MUSIC 10: CONCERT BAND YEAR LONG	☐

Unscheduled course

      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 [   ] ➕ Add   ☐ Ignore warnings

👆 Select...   ➖ Drop All   🔒 Lock All   🗹 Reschedule...   🔗 Post   ↩ Revert

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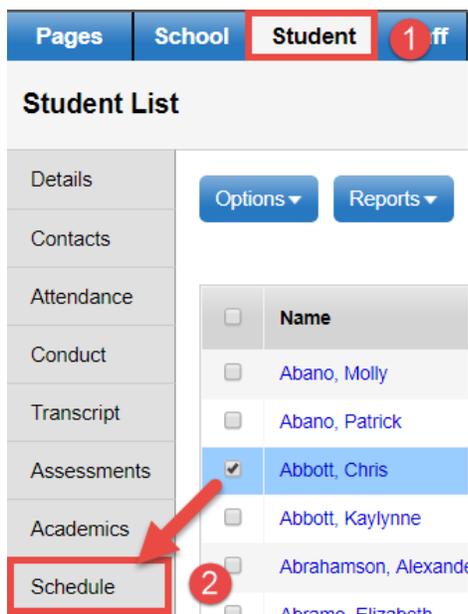
3. Click the **Workspace** sub-side tab. Ensure the view shows the classes as a list. The blue hyperlink will say *Matrix view*. This means the List view is being displayed.

View and make changes as of: 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**.

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.

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

	Number	Description	
☐	MEN--10	**ENGLISH 10**	Add...
☐	MFMP-10	FOUNDATIONS OF MATH AND PRE-CALCULUS 10	
☐	MMCB-10Y	MUSIC 10: CONCERT BAND YEAR LONG	
☐	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

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

Course [_____] ☐ Ignore warnings [➕ Add]

[🖐 Select...] [➖ Drop] [📅 Reschedule...]

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	☑

☑ OK   ✖ Cancel

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.
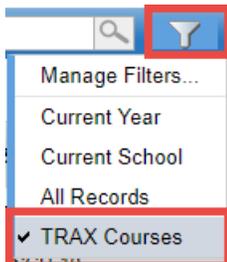
Appendix A – Finalizing Transcript Records

This is a review of the fields that must be populated for a transcript record to be 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**
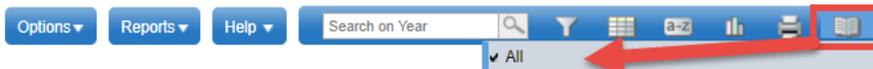
3. Set the filter to **TRAX Courses**

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.