



School District 8
Kootenay Lake

Creating a Next Year Schedule - Elementary

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1.0 BUILD CHECKLIST – ELEMENTARY SCHOOLS

Note: School staff completing these tasks will require the security role of **Schedule Builder** assigned to their user names.

✓	Task	Navigation	Comments
	Assign next school values to students	School view > Student top tab > set field set to Pre-Transition <ul style="list-style-type: none"> • Set filter to Primary Active Students • Set filter to Pre-Reg Students 	<ul style="list-style-type: none"> • Assign appropriate next school values for all students. • Set other fields as appropriate (retain grade, withdraw, etc.).
	Set the School Build Year Context	School view > School top tab > Setup side tab > Details leaf > General sub-top tab > Build Year Context > School year	<ul style="list-style-type: none"> • Click the red X to clear the value and click Save. • Use the magnifying glass to select the next school year.
	Review Staff Lists	School view > Staff top tab > <ul style="list-style-type: none"> • Set filter to All Active Staff • Set filter to All Secondary Staff 	<p><u>Never</u> add to or delete staff from the school. This is a district-level task.</p> <ul style="list-style-type: none"> • Advise district support staff of any new teachers required. • To prevent a teacher from appearing in the staff list, the School > Name field can be set to blank in the Details side tab. • If there are teachers in the All Secondary Staff filter that are required for next year, select them > Options > Show Selected > Options > Rollover Staff Schools.
	Copy school course catalogue to the build year	School view > Schedule top tab > Courses side tab > set filter to Build Year > Options > Copy Course Catalog	<ul style="list-style-type: none"> • Ensure all courses copied. Courses that have changed or been removed from the Enterprise catalogue will not copy forward and the new versions will need to be brought into the Build Year course catalog.
	Ensure necessary rooms exist	School view > Schedule top tab > Rooms side tab	<ul style="list-style-type: none"> • Do not remove rooms that are in use in the current year • Add rooms that are needed for next year, but do not exist in the list.

✓	Task	Navigation	Comments
	Create a Scenario	Build View > Scenario top tab > Options > Add	<ul style="list-style-type: none"> • Ensure the school year beside the school name at the top of the screen shows the next school year. • Create a new Scenario. Note: Rename the new schedule to reflect next year. <i>Ex. 2018-2019 Schedule to Commit</i>
	Check the details of the new scenario	Build View > Scenario top tab 1. Details 2. Terms 3. Days 4. Periods	<ul style="list-style-type: none"> • Adjust start date and end date to reflect the first and last days of school. • Schedule terms should be 1/1 • Days per cycle should be 1 • Periods per day can be 1 or 2 • Save!
	Set Term dates	Build View > Scenario top tab > click the blue hyperlink to see the detail of the scenario > Terms sub-side tab.	<ul style="list-style-type: none"> • Click the blue hyperlink for the FY schedule term <ul style="list-style-type: none"> ○ Code: should be FY ○ Name: should be Full Year ○ Base terms per year: <i>must</i> be 1 > click Set ○ Check the Term map box. ○ Click Set date. Enter the start and end dates of the school year. ○ Grade term cover maps are irrelevant at this time. • Save!
	Copy sections from the current year active schedule into the new scenario	Build View > Workspace top tab > Options > Copy Sections ... > Copy from current year > Active Schedule > Copy all	<ul style="list-style-type: none"> • This will copy all sections from the current year schedule into the build scenario.
	Check the course sections copied into the scenario	Build view > Workspace top tab > Set field set to Elementary Required Fields Tips: <ul style="list-style-type: none"> • Use the Teacher Name Contains? Filter to retrieve all sections for a specific teacher. This is a quick way to assign a new teacher to all of those sections. • Use the Elem – Section # = ? filter to confirm that 	<ul style="list-style-type: none"> • All sections in the current master schedule should have been copied forward. • Additional sections can be created, if necessary, by using Options > Add. • Sections that are not needed can be deleted by checking the box beside the section and using Options > Delete. • Ensure all sections have a Schedule Term > Code of FY.



✓	Task	Navigation	Comments
		sections with the same number have the correct teacher assigned. <ul style="list-style-type: none"> Use the Grade = ? filter to quickly see how many sections exist for each <i>course</i> at each course grade level. 	<ul style="list-style-type: none"> Adjust section detail as required – teacher, platoon code, max enrollment.
	Assign Next Homeroom values to students (optional).	<p><u><i>This is rare at the elementary level due to the high probability of organizational changes.</i></u></p> <p>Student top tab</p> <p>Tip: Use the Student Grade = ? filter to call up students in a specific <i>current</i> grade to assist with assigning homerooms.</p>	<ul style="list-style-type: none"> Use Options > Refresh to ensure changes to next school values for students are updated. Confirm the count is the same between the Students to Schedule filter and the All Students filter. Use Options > Modify List to assign Next Homeroom values.
	Load students into sections (optional)	<p><u><i>This is rare at the elementary level due to the high probability of organizational changes.</i></u></p> <p>Build view > Scenario top tab > click into the details of the scenario > Workspace top tab > select all XAT—00 HR sections > Options > Show Selected.</p>	<ul style="list-style-type: none"> Load students into only one class (ex. Homeroom or Term Comment class), so if there are changes students only one course needs changes. During school startup activities in Aug/Sep, students are loaded into the rest of their classes. Options > Group Scheduling > use Next Homeroom to use the next homeroom value on the student record to load the students into the XAT homeroom course sections.

Note: The master schedule will be “committed” after EOYR as a school start-up activity.

2.0 Assign next school values to students


Option 1: Sort & Use Modify List

This method would be used if most students have already been assigned a next school value and the objective is to review or modify the next school value for students that do not have one.

1. In the **Student** top tab, use the  icon to select the **Primary Active Students** filter. (Repeat the steps below for the **Pre-Reg Students** filter).
2. Use the  icon to select the **SD8: Elementary Pre-Transition** field set.
3. Click the **NextSkl > Name** header to sort any blank fields to the top.


<input type="checkbox"/>	Name	Pupil #	Grade	EnrStatus	School > Name	NextSkl > Name ▲
<input type="checkbox"/>	Student names blanked for privacy	1515892	04	Active	Okanagan Falls Elementary	
<input type="checkbox"/>	Student names blanked for privacy	1515853	06	Active	Okanagan Falls Elementary	

Click this header to sort blanks to the top.

4. In the **Options** menu, click **Modify List**.
5. Click the  icon in the **NextSkl > Name** column to open the column for editing.
6. Populate the next school field with the school the student will attend in the next school year. If unknown, leave blank and check the **Withdraw** box.



<input type="checkbox"/>	Name	Pupil #	Grade	EnrStatus	School > Name	NextSkl > Name
<input type="checkbox"/>	Student names blanked for privacy	1223349				<input type="text"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Student names blanked for privacy	2168845				<input type="text"/> <input type="checkbox"/> <input checked="" type="checkbox"/>




Populate with the school the student will attend next year. If none, leave blank.


7. Click the  icon before leaving the column or moving to a new page!

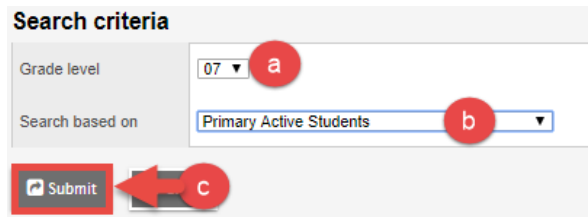
Option 2: Mass Updating

This method would be used if students next school values have not yet been assigned and there is no concern about over-writing manual adjustments.

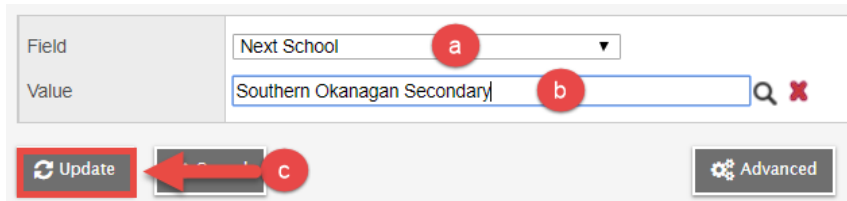
1. In the **Student** top tab, use the  icon to select the **Primary Active Students** filter.
2. Use the  icon to select the **Pre-Transition** field set.
3. In the **Options** menu, select **Mass Update**.
4. In the pop-up window, set the following:
 - a. **Field** = use the drop-down menu to select **Next School**.
 - b. **Value** = use the magnifying glass to select the current school name that most students are returning to.
 - c. Click **Update**. Read the pop-up warnings carefully and confirm the update, if appropriate.

Field	Next School 
Value	Okanagan Falls Elementary 5314002  <input type="text"/> <input type="checkbox"/>
<input checked="" type="checkbox"/> Update  <input type="checkbox"/> Advanced	

5. Use the  icon to select the **Grade Level = ?** filter.
 - a. **Grade level:** set to the grade level leaving the school.
 - b. **Search based on:** set to **Primary Active Students**.
 - c. Click **Submit**.



6. In the **Options** menu, click **Mass Update**.
 - a. **Field:** use the drop-down menu to select **Next School**.
 - b. **Value:** use the magnifying glass to select the school these students will be attending in the next school year.
 - c. Click **Update**. Read pop-up messages carefully and proceed, if appropriate.



7. Manually adjust the **Next School** values for individual students who may be leaving this school for other schools in the province, or who are withdrawing to go out of province.


Options > Modify List > click the **pencil** icon at the top of the **NextSkl > Name** field.

- a. **Leaving for other schools in the province:** set the **Next School** value to the other school, only if requested by that school to do so.
- b. **Leaving the province, or unknown destination:** remove the **Next School** value and check the **Withdraw** box.

<input type="checkbox"/>	Name	Pupil #	Grade	EnrStatus	School > Name	NextSkl > Name
<input type="checkbox"/>	Student names blanked for privacy	1223345				<input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>		2168845				<input type="checkbox"/> <input type="checkbox"/>

Populate with the school the student will attend next year. If none, leave blank.

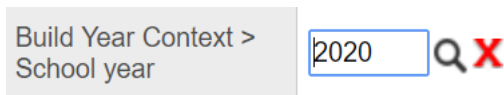
Remember to check the Pre-Reg Students filter to ensure these students also have next school values!

8. In the **Student** top tab, set the  icon to **Next Year Students**. This will generate a list of all students with a next school value set to this school.

3.0 Set the School Build Year Context

The build year context tells the system what the next school year is so the master schedule from the current year can be copied forward to the next year (build year).

1. In the **School** top tab, click the **Setup** side tab
2. Click the blue hyperlink of the school number ID.
3. In the **General** sub-top tab, use the **X** icon to delete the current value in the **Build Year Context > School year** field.
4. Click Save.
5. Use the **Q** icon to select **the next school year** from the pop-up menu. When selected, this value will show the *end* of the **next** school year.



6. Click **Save**.

4.0 Staff Lists and Staff Secondary School Associations

1. In the **Staff** top tab, set the filter to **All Active Staff**.
2. Review the list and advise district support of staff who will be leaving your school, or of staff that will be required for next year, if known.


Note: Some staff may have a different school name in the **School > Name** column. This means they are associated to more than one school.

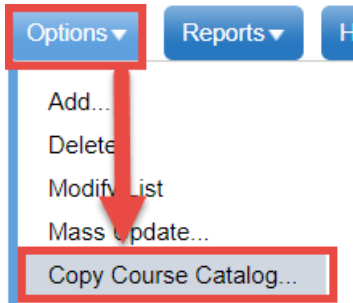
3. In the **Options** menu, click **Rollover Staff Schools...** to ensure staff that are shared with other schools are available in the Build view (if needed for next year).

Do NOT add or delete staff from this screen. Let district staff know if adjustments need to be made for the next school year.

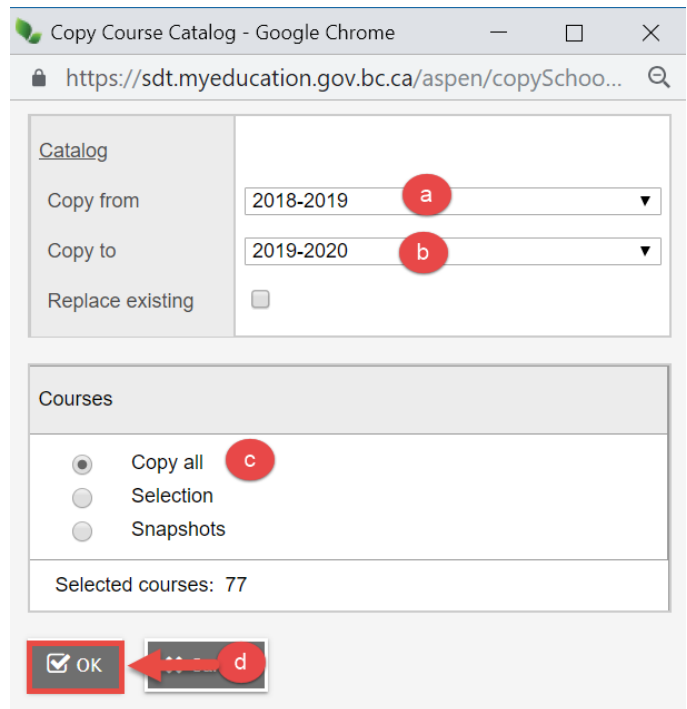
Name	StaffID	Type	HomePhone	CellPhone	Email1	School > Name
Staff names blanked for privacy	424542	Secretary				Crawford Bay StrongStart Ctr
	S1012210	Teacher				Erickson Elementary
	S1071239	EA				Erickson Elementary
	314982	Secretary				Erickson Elementary
	S1071238	EA				Erickson Elementary

5.0 School Course Catalogue

1. In the **Schedule** top tab, click the **Courses** side tab.
2. Use the  icon to select the **Build Year** filter. Note that the upper right corner should show the next school year. If it does not, go back and repeat the steps in *Set the School Build Year Context*.
3. In the **Options** menu, select **Copy Course Catalog**.



4. In the pop-up window:
 - a. **Copy from** = current school year
 - b. **Copy to** = next school year
 - c. **Courses selection** = Copy all.
 - d. Click **OK**.
5. Compare the number of courses in the **Current Year** filter and the **Build Year** filter to ensure all courses copied forward.



6.0 Rooms

School view > Schedule top tab > Rooms side tab

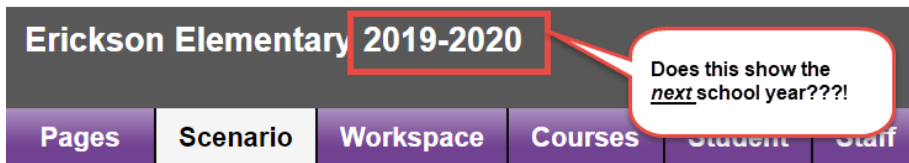
Rooms in use in the current year schedule should not be removed. Rooms required for next year may be added.

1. In the **Options** menu, select **Add**.
 - a. **Number**: the room number
 - b. **Department, Type, Building and Location Code** will not be applicable to elementary scheduling.
 - c. **Max capacity**: This is the maximum capacity of the room by regulations. If students are loaded into classes through the build view, this should be set to a valid value (30).
 - d. **Include in scheduling**: This box must be checked in order for the room to be assigned to sections in the Build view.
2. Click **Save**.

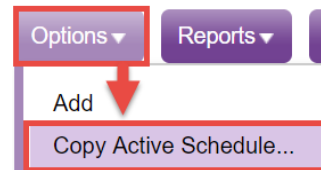
7.0 Create a Scenario

Change view to the **Build View**

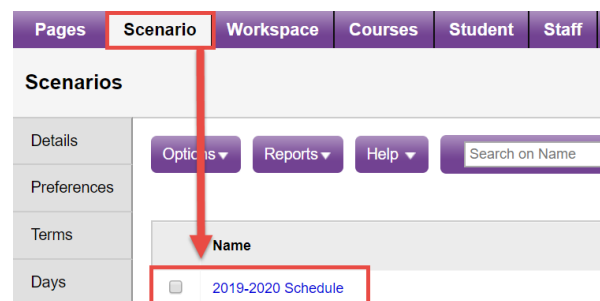
1. Click the **Scenario** top tab. *Ensure the school year beside the school name at the top represents the next school year.*





2. In the **Options** menu, select **Copy Active Schedule**.



3. In the pop-up screen:
 - a. **New Scenario Name**: enter a name that represents the next school year. **Example**: **2019-2020 Schedule**.
 - b. **Master Schedule**: box must be checked.
 - c. Click **OK**. The system will ask for confirmation to create a new scenario. When the process is complete, a scenario will appear in the Build view.






4. Click the blue hyperlink of the new scenario to confirm the details:
 - a. **Start Date:** Enter the first day of school for the *next* school year.
 - b. **End Date:** Enter the last day of school for the *next* school year.
 - c. **Schedule terms:** Should say **1/1** to represent that all courses are full-year. If this value is incorrect, see the *Adjusting the Schedule Structure* section of this document.
 - d. **Days per cycle:** Should be **1**. There is only one day in an elementary school schedule because students normally stay in the same classroom each day. If this value is incorrect, see the *Adjusting the Schedule Structure* section of this document.
 - e. **Periods per day:** Should be **1**. If this value is incorrect, see the *Adjusting the Schedule Structure* section of this document.

Name *	2019-2020 Schedule
Start date *	9/3/2019  a
End date *	6/26/2020  b
Schedule terms	1/1 c
Days per cycle	1 d
Periods per day	1 e

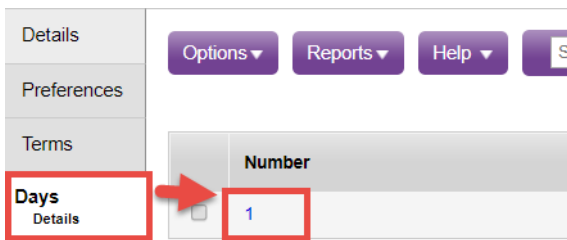
8.0 Adjusting the Schedule Structure

1. **Terms** side tab: One row should appear for **Full Year** term. Click on the blue hyperlink to view the details. If nothing appears on this screen, go to the **Options** menu and click **Add**.
 - a. **Code:** should be **FY**. This represents that all classes are offered in a full-year format.
 - b. **Name:** should be **Full Year**.
 - c. **Base terms per year:** must be set to **1**. Click the **Set** button.
 - d. **Term map:** Box must be checked.
 - e. **Set date:** click the button to present the date fields.
 - f. Set **Start** and **End** date fields to represent the start and end of the *next* school year.
 - g. **Grade term cover map:** this can be ignored at this time. It will need to be re-set in the new school year.
 - h. Click **Save**.

If other schedule terms are present, click into the detail of that schedule term and use **Options > Delete** to remove them.

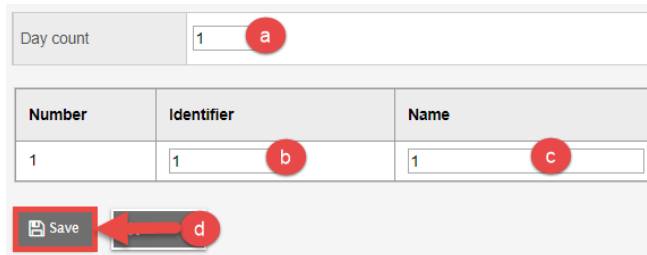
Preferences	 h
Terms ▶ Details	
Days	
Periods	
Rotations	
Bell Schedules	
Code	FY a
Name	Full Year b
Base terms per year	1 <input type="button" value="Set"/> c
Term map	<input checked="" type="checkbox"/> d
Term Date Ranges	<input type="button" value="Set date"/> e
1	Start: 9/3/2019  End: 6/26/2020  f
Grade term cover map	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> g

2. **Days** side tab: One day should appear.

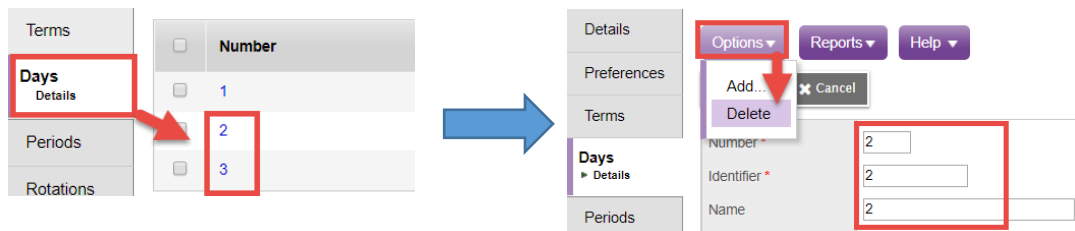


If a day does not appear, go to the **Options** menu and click **Add**. Populate the fields as follows and click **Save**.

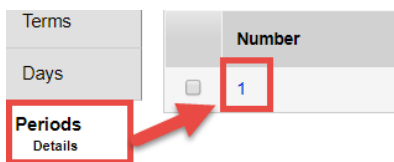
- Day count:** enter 1.
- Identifier:** enter 1
- Name:** enter 1
- Click **Save**.



If multiple days appear that are not required, click the blue hyperlink for each day that is not required. In the **Options** menu, click **Delete**.



3. **Periods** side tab: One period should appear.



If a period does not appear, go to the **Options** menu and click **Add**. Populate the fields as follows and click **Save**.

- Period count:** enter 1.
- Identifier:** enter 1
- Name:** enter 1
- Click **Save**.



If multiple periods appear that are not required, click the blue hyperlink for each period that is not required. In the **Options** menu, click **Delete**.



9.0 Review Courses

Build view > Courses top tab > Set field set to Elementary Required Fields

1. In the **Options** menu, click **Refresh**. This ensures all course changes for the build year are displayed.
2. Set the filter to **Include in Scheduling = N**. If any courses appear here that are needed for next year, use **Options > Modify List** to set the flag to Y.
3. Change the filter back to **Courses to Schedule**.
4. In the **Schd?** column, the value should be **Y** for all courses being used.
5. In the **EnrMax** column, set a value that represents the total number of students that can be in a section (class) for this course should be entered.

2018-2019 Schedule to Commit

Pages Scenario Workspace **Courses** Student Staff Rooms Rules Global

Courses

Details Options Reports Help Search on CrsNo

Requests 1:ATT-AM 0 of 62 selected

CrsNo	Description	Schd?	EnrMax
ATT-AM	AM Attendance	Y	30
ATT-PM	PM Attendance	Y	30
MADST02	APPLIED DESIGN SKILLS AND TECHNOLOGIES 2	Y	30
MADST03	APPLIED DESIGN SKILLS AND TECHNOLOGIES 3	Y	30
MADST04	APPLIED DESIGN SKILLS AND TECHNOLOGIES 4	Y	30
MADST05	APPLIED DESIGN SKILLS AND TECHNOLOGIES 5	Y	30
MAE-K	ARTS EDUCATION K	Y	30
MAE-01	ARTS EDUCATION 1	Y	30
MAE-02	ARTS EDUCATION 2	Y	30
MAE-03	ARTS EDUCATION 3	Y	30
MAE-04	ARTS EDUCATION 4	Y	30
MAE-05	ARTS EDUCATION 5	Y	30

Do all necessary course codes appear?

10.0 Review Students

Build view > **Student** top tab > Set the field set to **Elem – with Hrm Info**

1. In the **Options** menu, click **Refresh**. Wait for the list to refresh with the most recent information.
2. Set the filter to **Include in Scheduling = N**. If any students appear here that are needed for next year, use **Options > Modify List** to set the flag to Y.
3. Change the filter back to **Students to Schedule**.
4. Review the student count and ensure necessary students appear in the list. Students who do not appear have not been assigned a next school value that matches this school.
 - If the student is currently in attendance at this school and is attending next year, go back to the school view and assign an appropriate next school value.
 - If the student is currently attending another school and is attending this school next year, contact the school the student is attending and request that the next school value be set to this school.
5. **NextHomeroom** column (optional): if known, a next year homeroom value can be assigned to each student that will transfer to the **Homeroom** field in the new year.

Pages Scenario Workspace Courses Student Staff Rooms Rules Global							
Students							
Options Reports Help Search on Name							
1 Aksidan, Shawn 0 of 158 selected							
Name	Pupil #	Grade	Platoon	Schd?	Homeroom	NextHomeroom	
Student names blanked for privacy	1563091	02		Y	05		
	2015853	02		Y	06		Optional
	2015806	02		Y	07		
	1418166	04		Y	09		

11.0 Review Staff

Build view > **Staff** top tab > Set the filter to **Copy of Default Fields**

1. In the **Options** menu, click **Refresh**. Wait for the list to refresh with the most recent information.
2. Set the filter to **Include in Scheduling = N**. If any staff members appear here that are needed for next year, use **Options > Modify List** to set the flag to Y.
3. Change the filter back to **Staff to Schedule**.
4. Confirm necessary staff appear in the scenario. Contact district support if required staff do not appear. Note that staff leaving the school next year will continue to appear in this list.
5. **Schd?** column: Ensure that all staff who will be assigned to sections (classes) next year, have a Y in this column.

Name	Department	Schd?
Teacher names blanked for privacy		Y
		Y
		Y
		Y

12.0 Review Workspace Section Details

Build view > **Workspace** top tab > set field to **Elem – Section Detail**

When the active schedule was copied from the current year, all sections in the current master schedule were created for next year. Review these sections and add, delete, or modify their information as necessary.

1. **Primary Staff > Name:** Click the column header to sort by teacher name. Review the class assignments and modify if necessary.
2. **Schedule Term > Code:** Click the column header to filter any blanks to the top. All classes must have a schedule term code of **FY**.
3. **Platoon:** Click the column header to sort by platoon number. Check the platoon assignment for each teacher's section. Adjust, if necessary. If unknown, this can be set in the new school year.
4. **Max:** Click the column header to filter any blanks to the top. All classes should have a value that reflects the number of students permitted into the class.

Tip: Use the filter menu to reduce the list for easier viewing and modifying. For example, all sections of a particular grade or teacher.

Useful filters:



Teacher Name Contains?: Enter a portion of the teacher name to retrieve all sections with that teacher assigned.



Grade = ?: choose a grade level for a course to retrieve all sections for that course grade level.

Course	SecNo	Primary Staff > Name	PrimaryRoom > Num	Schedule Term > Code	Schedule	Platoon	PlatoonScheduleMode	Team	Max
MADST03-01	01	Teacher names blanked for privacy		FY		08	0		30
MAE-03-01	01			FY		08	0		30
MCE-03-01	01			FY		08	0		30
MEN-03-01	01			FY		08	0		30
MMA-03-01	01			FY		08	0		30
MPHE-03-01	01			FY		08	0		30
MSC-03-01	01			FY		08	0		30

Appendix A: To Create Additional Sections for Courses

As school enrollment is dynamic, sometimes an additional section is required for a grade level of courses. The steps below outline the easiest way to create these sections.

1. In the **Build** view, click the **Scenario** top tab.
2. Click the blue hyperlink to go into the detail of the scenario.
3. Click the **Courses** top tab.
4. Use the  icon to select the **Required Crs Fields** field set.
5. Use the  icon to select **Grade = ?**
 - a. **School Course > Grade level:** enter the grade level of course that needs additional sections.
 - b. **Search based on:** leave at Courses to Schedule
 - c. Click **Submit**. The course list will now show all the course in the grade level selected.

6. In the **Options** menu, select **Modify List**.
 - a. In the **Sections** column, click the  icon to open the column for editing.
 - b. Enter the number of sections needed into the box beside each course.
Remember to click the  icon to save the changes!

7. Click the **Workspace** top tab.
 - a. In the **Options** menu, select **Initialize Sections...**
 - b. In the pop-up window, select the **Grade** option. This will generate a window from which the grade level can be selected.
 - c. Select the grade level of course that requires additional sections and click **OK**.
 - d. Click **OK** in the *Initialize Sections* window to start the process.
8. The new sections will now appear in the workspace. Ensure the following fields are populated, at a minimum:
 - a. Schedule term = FY
 - b. Max: enter number of students that can be in each section.

