



MyEducationBC

Elementary Scheduling

Using the Build View for Next Year Scheduling

April 13, 2016 v1.2

Version History

Version	Date	Description
1.0	June, 2015	Initial document created
1.1	June 11, 2015	Update to Section 5 – Loading Students into Sections
1.2	April 13, 2016	Removed sections on District and School courses; Removed section 3.5 Rooms in Build view

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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 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.

2.1 Security


School users that will be accessing the Build view will require the following security role:

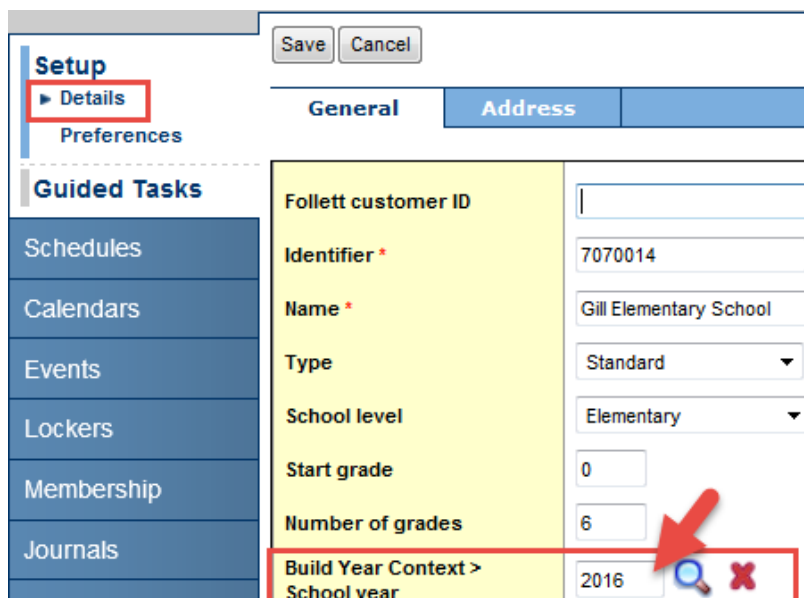
- Schedule Builder

2.2 School Details

To use the Build view, the Build Year Context must be set to the appropriate year in the school's details.

2.2.1 To set the Build Year Context:

1. In the **School** view, select the School top tab.
2. Click the **Setup** side tab.
3. Select the **Details** leaf.
4. In the **Build Year Context > School year** field, click the  and select the school year representing *next* year.
5. Click **Save**.





The screenshot shows a web application interface for school setup. On the left is a navigation menu with 'Setup' selected and 'Details' highlighted. The main area has tabs for 'General' and 'Address'. A form contains several fields: 'Follett customer ID', 'Identifier *' (7070014), 'Name *' (Gill Elementary School), 'Type' (Standard), 'School level' (Elementary), 'Start grade' (0), and 'Number of grades' (6). The 'Build Year Context > School year' field is highlighted with a red box and contains '2016'. A red arrow points to a magnifying glass icon next to the year field, and a red 'X' icon is also visible.




2.3 Student Next School Assignments





Placing students into sections will be optional for elementary schools. However, to see students in the Build view, they will require a next school assignment. It will be necessary to assign next school values to students who have been pre-registered for the next school year as well.

2.3.1 To assign a next school to students:


1. In the **School** view, select the **Student** top tab.
2. Use the  icon to select **Primary Active Students**.
3. Use the  icon to select the **Pre-Transition** field set. The NextSk1 > Name field appears.
4. Populate the *NextSk1 > Name* field using one of the following methods:

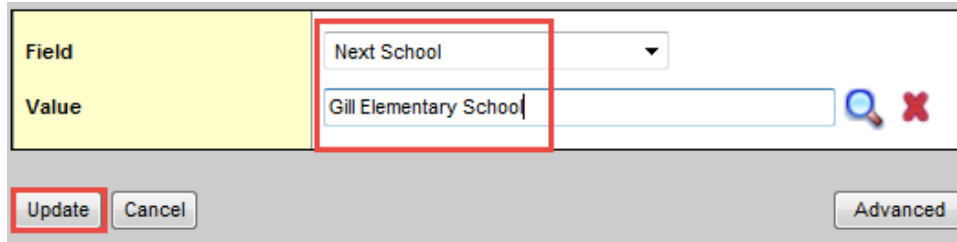
Option 1:

- a. In the **Options** menu, select **Modify List**.
- b. Click the  icon to activate the *NextSk1 > Name* fields beside each student.
- c. Use the  to select the next school value for the student, or begin typing the school name in the field.
- d. When all values have been assigned, click the  icon to save the records.

School > Name	NextSk1 > Name		
	<input checked="" type="checkbox"/> <input type="checkbox"/>		
Gill Elementary School	AW Neill Elementary		<input type="checkbox"/>
Gill Elementary School	AW Neill Elementary		<input type="checkbox"/>
Gill Elementary School	AW Neill Elementary		<input type="checkbox"/>
Gill Elementary School	AW Neill Elementary		<input type="checkbox"/>

Option 2:

- a. Select the student records that will have the same next school value.
- b. In the **Options** menu, select **Mass Update**.
- c. Use the drop down menu to select the **Field** value of **Next School**.
- d. Use the  to select the next school value for these records.
- e. Click the **Update** button to update the records.



The screenshot shows a form with two main sections: 'Field' and 'Value'. The 'Field' section has a dropdown menu currently showing 'Next School'. The 'Value' section has a text input field containing 'Gill Elementary School'. To the right of the text input is a magnifying glass icon and a red 'X' icon. Below the form, there are three buttons: 'Update', 'Cancel', and 'Advanced'. The 'Update' button is highlighted with a red box.

2.4 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, they can be added to the staff list in the school view. Users may need to refer to their district policy for managing staff records in MyEducation BC (whether this is a school task or a district task).

2.5 Staff Secondary School Associations



There are two scenarios where a school may want to review the secondary school associations attached to staff.

1. Staff who teach at more than one school and this school is the secondary school.
 - If these staff members need to be attached to classes for next year in the Build view, they will require a secondary school association for the next school year.
2. Staff who teach at a different school in the current year but are required in this school to assign classes for in next year. Once the new school year has begun, the school can set the appropriate primary school on the staff details and remove or end the secondary school association.

Ensure appropriate staff secondary school associations are in place will make these staff members visible in the Build view to assign to classes.


- These staff members can be given a secondary school association to the new school by their current school, using a next year school context.

To assign next year secondary school associations:

1. In the **School** view, select the **Staff** top tab.
2. Check the box beside the staff member requiring a next year school association where this school is not the primary school.
3. Click the **Schools** side tab.
4. In the **Options** menu, select **Add**.
5. In the **School > Name** field, use the  to select this school, or begin typing the school name for autofill.
6. In the **School year** field, use the  icon to select the next school year.
7. Populating the other fields is optional.
8. Click **Save**.

Note: If this school will become the primary school after the end-of-year rollover, the secondary school association will need to be deleted and the primary school name changed in the staff details.

Save Cancel

School > Name *	Gill Elementary School
School year *	2016 
Job	Teacher ▼
Subject code	▼
Full time equivalent	0

2.6 Courses

2.6.1 District Course Catalogue

The district course catalogue must be created for the next school year so schools can copy or create their course catalogues for the next year. Ensure the required elementary-level courses are in the district catalogue, including the ATT—AM and ATT—PM courses for elementary attendance, if using the period attendance method for elementary schools. The XAT—EL course should also be available for districts with StrongStart Centres.

Please refer to Scheduling Module 2 Course Catalogues, Student and Staff setup, on the www.myeducationbc.info website under Resources > School Scheduler Resources.

2.6.2 School Course Catalogue

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

Please refer to Scheduling Module 2 Course Catalogues, Student and Staff setup, on the www.myeducationbc.info website under Resources > School Scheduler Resources.

2.7 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, or any school (Secondary, Middle, DL, CE, etc,) 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**.

The screenshot shows the MyEducation BC interface. At the top, the user is logged in as 'Gill Elementary School 2015-2016'. A red arrow points to the '2015-2016' text. In the top right corner, there is a 'Settings Bar' with buttons for 'Change View', 'Select School', 'Set Preferences', and 'Log Off'. A red arrow points to the 'Build View' button. Below this is a navigation bar with tabs for 'Pages', 'Scenario', 'Workspace', 'Courses', 'Student', 'Staff', 'Rooms', 'Rules', and 'Global'. The 'Rooms' tab is highlighted with a red box. On the left side, there is a 'Page Directory' with a 'Home' icon. The main content area shows an 'Announcements' section with the text 'Welcome to MyEducation BC!' and a message dated May 31, 2015: 'Aspen has been updated. Press F5 to update your browser.'

- 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.

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.

Code	Name
FY	FY

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.

NOTE: There is currently a request in with the Operations Standards Committee, for the recommendation of moving ahead with ATT-AM and ATT-PM courses for Attendance.

- 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.
- If the school is not currently using period-based attendance in the current year, but intends to use it next year, then add 1 day to this screen. Using the **Options** menu, select **Add** and enter the required value.

Pages Scenario Workspace Courses Student Staff Rooms Rules Global

Options Reports Help

Scenarios :: Copy of 2014 Schedule

0 of 1 selected

Number	ID	Name
1	1	Day 1

Days Details

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.

NOTE: There is currently a request in with the Operations Standards Committee, for the recommendation of moving ahead with ATT-AM and ATT-PM courses for Attendance.

- 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.
- If the school is not currently using period-based attendance in the current year, but intends to use it next year, then add the required periods to this screen. Using the **Options** menu, select **Add** and enter the required values.

Pages Scenario Workspace Courses Student Staff Rooms Rules Global

Options Reports Help

Scenarios :: Copy of 2014 Schedule

0 of 2 selected

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

Periods Details

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. 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
Course is in the School view list under Build Year, but does not show in the Build View > Courses list	<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
Course was added to the Build view > Courses in error and cannot be deleted.	Courses can be added to the Build view, but must be deleted through the School view.	School view > Schedule top tab <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** side 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.

BRITISH COLUMBIA MyEducationBC Amy Woodland Elementary 2016-2017 Copy2 of 2015-2016 Change View Select School Set Preferences Log Off Build View

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

Options Reports Help Search on CrsNo

Courses ⚠

Details < 1:ATT--AM > 0 of 45 selected  All Records

Requests	CrsNo	Description	Schd?	EnrMax
<input type="checkbox"/>	ATT--AM	AM Attendance	Y	30
<input type="checkbox"/>	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, Alix	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 Modifying information on sections

Modify List or Mass Update functions can be used on these fields to make necessary adjustments:

- **SecNo:** The section number can be adjusted, if necessary.
- **PrimaryStaff > Name:** Staff member assigned to the section can be adjusted as necessary.
- **PrimaryRoom > Num:** A room can be assigned as appropriate. This is optional.
- **ScheduleTerm > Code:** all sections should have a term code of FY for elementary schools.
- **Schedule:** A schedule expression is only necessary for courses in which attendance is being recorded (ATT—AM and/or ATT—PM).
- **Platoon:** If platoons are being used for group scheduling, the values can be updated here. This is not necessary if the school is not using platoon codes for Group Scheduling.

NOTE: Group Scheduling will be covered in the August timeframe.





Course	SecNo	ScheduleTerm > Code	Unrotated Schedule	Schedule	PrimaryStaff > Name	PrimaryRoom > Num	Total	Max	ExcludeFromBuild	SysRank	Sched?
ATT-AM-001	001	FY		AM(1)	Lindholm, Rachelle		0	20	N	0	N
ATT-PM-001	001	FY		PM(1)	Lindholm, Rachelle		0	20	N	0	N
MDNC-03-001	001	FY			Lindholm, Rachelle		0	20	N	0	N
MDR-03-001	001	FY			Lindholm, Rachelle		0	20	N	0	N
MENR-03-001	001	FY			Lindholm, Rachelle		0	20	N	0	N
MENS-03-001	001	FY			Lindholm, Rachelle		0	20	N	0	N

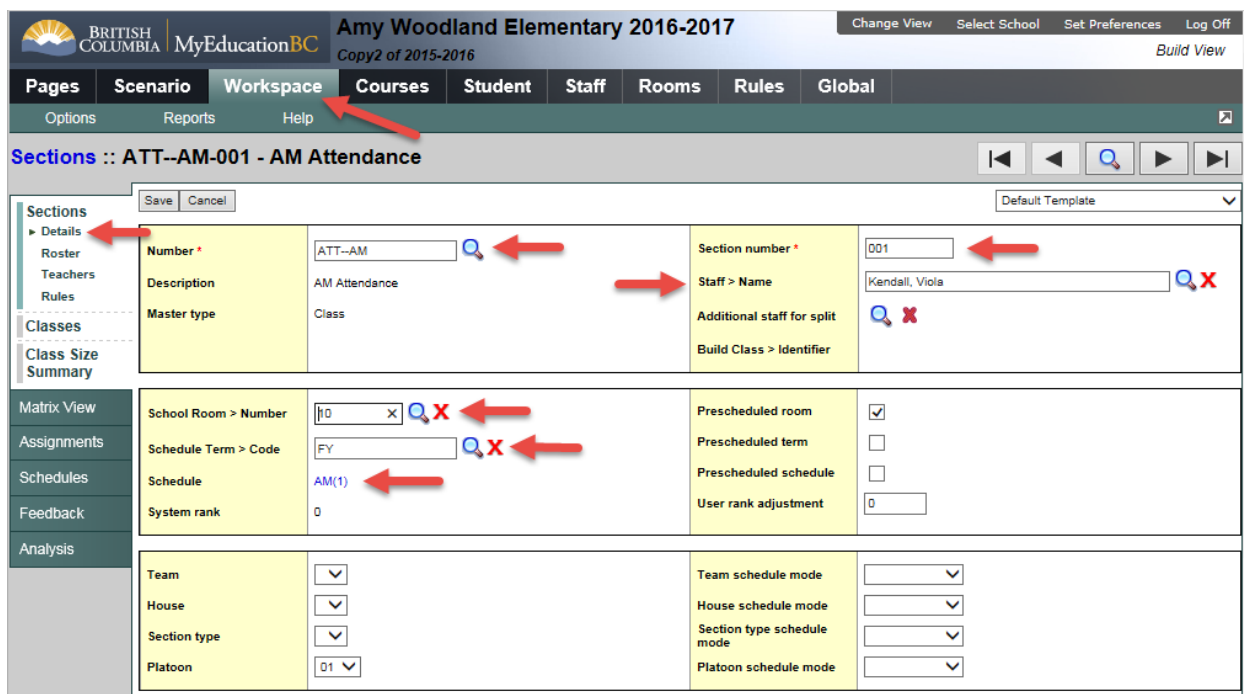
4.1.2 Adding a section

Build view > **Workspace** top tab > **Sections** side tab

If additional sections are required for a course, they can be added here:

1. In the **Options** menu, select **Add**.

- In the **Number** field, use the  to select the course code that requires the new section.
- Populate the **Section number** field with the desired value.
- Use the  in the **Staff > Name** field to select the staff member for the section.
- Use the  in the **SchoolRoom > Number** field to select the room for the section.
- Use the  in the **Schedule Term > Code** field to select the FY term code for the section.
- Click the **Edit Schedule** hyperlink on the **Schedule** field *only if attendance will be taken on this course*.
- The **Platoon** field is optional and could be selected, if the school is using the Group Scheduling function.
- Click **Save**.



The screenshot shows the 'Sections' form in the 'Build View' of MyEducationBC. The form is titled 'Sections :: ATT-AM-001 - AM Attendance'. It has a 'Save' button and a 'Cancel' button. The form is divided into several sections:

- Number:** ATT-AM (with a magnifying glass icon and a red arrow pointing to it).
- Description:** AM Attendance (with a red arrow pointing to it).
- Master type:** Class (with a red arrow pointing to it).
- Section number:** 001 (with a red arrow pointing to it).
- Staff > Name:** Kendall, Viola (with a magnifying glass icon and a red 'X' icon, and a red arrow pointing to it).
- Additional staff for split:** (with a magnifying glass icon and a red 'X' icon).
- Build Class > Identifier:** (with a red 'X' icon).
- School Room > Number:** 110 (with a magnifying glass icon, a red 'X' icon, and a red arrow pointing to it).
- Schedule Term > Code:** FY (with a magnifying glass icon, a red 'X' icon, and a red arrow pointing to it).
- Schedule:** AM(1) (with a red arrow pointing to it).
- System rank:** 0.
- Prescheduled room:**
- Prescheduled term:**
- Prescheduled schedule:**
- User rank adjustment:** 0.
- Team:** (dropdown menu)
- House:** (dropdown menu)
- Section type:** (dropdown menu)
- Platoon:** 01 (dropdown menu)
- Team schedule mode:** (dropdown menu)
- House schedule mode:** (dropdown menu)
- Section type schedule mode:** (dropdown menu)
- Platoon schedule mode:** (dropdown menu)

4.1.3 Deleting a section

Build view > **Workspace** top tab > **Sections** side tab

If sections have been created that are not required for the next school year, they can be deleted here:

- Check the box beside the section(s) to be deleted.
- In the **Options** menu, select **Delete**.
- Read the pop-up window and click **Continue** to confirm the deletion or **Cancel** to stop the deletion.

5.0 Loading Students into Sections

There are different options for loading students into sections of their courses for the next school year. Since elementary students stay in the same classroom with the same teacher for the full year, it is not necessary to load them into all the sections of all of their courses before the year rolls over. Group Scheduling or Homeroom Snapshot options can be used in the School View to load students as a school start-up task.

If the school really wants to load students into a section in the Build view, ***it is suggested that only one class is loaded*** (perhaps an ATT—AM section or an XAT homeroom section). If there is a change to the student roster, only one class would then need to be maintained. When the school year is rolled over, students could then be loaded into the rest of their courses using Group Scheduling or homeroom snapshot options defined in the Elementary Scheduling Guide.

Consider the following:

- How stable is the school population and how much adjustment would be made to students between different classes?
 - If the school population is highly transitional, the school may want to wait until the year rolls over and then assign new homerooms to students in the new school year.
 - If the population is quite stable and little movement of students between classes is expected, the school could use the Next Homeroom field to group students for next year classes.
- Create Next Homeroom snapshots in the student top tab. This would enable you to load students into all their courses by snapshot when the year has rolled over and the student population is more settled. Keep in mind that snapshots are static lists, so new students would need the appropriate snapshot added to their record and students withdrawing would need the appropriate snapshot deleted from their record.
- Loading students in the Build view would provide a way to generate class lists prior to the school year rollover.

5.1 To load students in the Build View

Build view > **Workspace** top tab > **Sections** side tab

1. Select the section to add students to by checking the box beside the section.
2. Click the **Roster** leaf.
3. In the **Options** menu, select **Add**.
4. Set the **Schedule Mode** drop-down menu to **Pull**.
5. In the **Students** area, select the method to use to select the students for this section:
 - a. **Selection**: allows the user to select multiple students, one by one.
 - b. **Snapshots**: can be used if a snapshot has been created to group students for loading into classes.
6. Click **OK**. The students will now appear in the roster list for the selected section.

The screenshot displays the MyEducationBC interface with the 'Workspace' tab active. The left sidebar shows the 'Sections' menu with 'Roster' selected. The main area shows a table with columns 'Pupil #' and 'Name'. A 'Multi-Add Students' dialog box is open, showing the following settings:

- Schedule Mode**: Pull (dropdown menu)
- Students** section:
 - Selection
 - Snapshots
 - Another section
- Selected students**: 28

Buttons for 'OK' and 'Cancel' are visible at the bottom of the dialog box.

6.0 Generating Class Lists

Build view > **Workspace** top tab > **Sections** side tab

If students have been loaded into a section of a course in the Build view, class lists can be generated for each teacher. **Note:** Class lists will only be generated for classes that have students in them. Empty sections will not generate a blank list.

1. In the **Reports** menu, select **Students** and click on **Class Lists**.
2. Use the **Sections to include** drop-down menu to select which sections class lists are being generated for. If anything other than **Current Selection** is chosen, the user will be required to enter the **Search Value** *exactly* as the selected detail on the class is entered.
3. Use **Sort results by** to choose what order the report will be generated in.
4. Click **Run**.

7.0 K-12 Considerations

K-12 schools that are scheduling the secondary grade levels, using the full functionality of the Build and Load, should submit a ticket, requesting one-on-one district support session to determine their individual requirements.