Scheduling: Terminology and Concepts
November 3, 2015

Training Strategy for Scheduling

https://www.isw-bc.ca/csi/nodefreeform.do?method=display&page=MYEDBC_SCHEDULING

Training consists of 10 Modules (each in 3 parts)

1. **Self Directed Learning:** Preview learning event from last year OR Follet's videos before the Learning Event
    - Follet videos need to all be downloaded and made available to any district staff.
2. **Online Learning Event** which will be recorded and replace the past recording
3. **Dedicated Support Session**

Each module will be delivered to coincide with business cycle events.

Outline with more detail

https://www.isw-bc.ca/csi/leaf.do?method=media&page=MYED_Sched_Train_Outline

NOTE: Very busy training schedule. SD63 needs a plan for this. If we don't have someone from each school we also need a plan to deliver this training to missing staff.

Introduce the Build View and the Layout

The Build View - What is it?

- The view to manage and define parameters of the coming year's schedule for students staff and courses and rooms.
- The Build view contains the components of Students' course requests, staff maintenance course maintenance and rooms - that are currently handled within the core of BCesis
  The location of this functionality - all contained in the Build view - is a new concept for Schools
- It is also the area in which a school goes through the build process of creating their Master Timetable.
  Similar to the MTb Module within BCesis

Build View Top Tabs

TERMINOLOGY and CONCEPTS

Scenario

- Scenarios are different versions of the school's Master Timetable
- Multiple scenarios can be created by one or more individuals and more than one person can work on a given scenario as you progress through the build process.
- Scenario Preferences - What you want the system to consider when building the schedule within this scenario
- Set up the Structure of this scenario including Terms, Days Periods and Rotations

Flat Schedule
Most high schools build a Flat schedule as represented on a scheduling board

Rotated Schedule
After a schedule is built it is often Rotated so the order in which periods are offered differs by date (some middle schools build a rotated schedule on their board)

Patterns - represent all the different ways course sections can meet.

Pattern Sets - grouping of patterns that can be applied to courses.

Base Terms - How many times can a course start in a school year. Full year courses = 1 semester courses = 2 quarter courses = 4

Cover terms - How many base terms will sections cover

Scheduling attributes - setting of staff, courses, students and rooms that are used by the build and load engines

House, Team, Platoon and Section type - all different ways of grouping students together

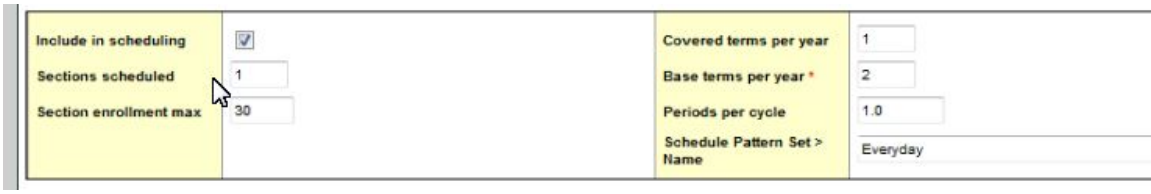
Rules are used to alert the system to any constraints it must follow when building your master schedule

Build is the process of placing course sections in a term, period, and day, and a room

Load is the process of placing students into the course sections

- Students are loaded into each Scenario. Provides a greater degree of flexibility in that, there are less iterations of having to re-load student after minor tweaks to the timetable.

Walk Through of all 10 modules (~43 minutes into recording)

- District view: copy course catalogue to the build year
- School view:
    - **Set the build year context!!**
    - Copy school course catalog forward
- Build view:
    - Scenario TT - Add in a scenario (later you can copy a scenario)
    - Set preferences for the scenario
    - Check terms (comes in from current year - can edit)
    - Check Days (comes in from current year - can edit)
    - Check Periods (comes in from current year - can edit)
    - Course Requests from the Global Top Tab
        - Online course requests are possible through the student portal. Otherwise course requests will be manually entered into the build view.
    - Rotations (very similar to a tumble pattern)
    - Patterns - Options for scheduling courses FY, Sem, Quarter - creates a pattern library
    - Patterns sets are groups of patterns - apply pattern sets to courses restricted to those times and patterns.
    - Attributes
        - Course details - in course list you can mass update and modify list. Course request field set. (cannot miss any items or build won't run - sort both ways to find empty fields)
        - 

        - Student, staff, and room attributes as well
            - Rooms must have a Max capacity - might make sense to set them higher than the course max.
    - Rules (some relate to build, load and build and load)
        - Use Rules judiciously. Apply and test then move on to the next rule.
        - Course Blocking - former Parent Child
        - Days Blocking - linear pair ie Math/PE
        - Wheel - Rotation
        - Room reservation - PE must be in a Gym, Science in a lab
    - Workspace TT
        - Initialize sections

        - You can manually schedule the musts...Art teacher must teach Art, set a room, set a specific semester. Build will build around these manual settings. (in some cases this is easier to do than creating a rule) Schedule in red text is manually scheduled.
        - OPTIONS > Build > Validate Build - will return errors that may need fixing (expected)
        - OPTIONS > Build > Build
        - Check through to see an issues
        - OPTIONS > Load - will load all the students into the courses
        - Workspace TT Analysis ST > Course Summary - feedback on any conflicts
    - Student TT
        - Workspace ST to adjust students
        - **Add on security role for counsellors** to go into the build view and adjust individual student schedules.
    - Workspace TT
        - Apply a rotation OPTIONS > Rotations > Rotate Schedule
    - Scenario TT (likely in late August)
        - Pick the scenario you want to commit
        - OPTIONS > Commit Schedule

Additional Notes

- You can print student schedules from the build view without committing the schedule.

- Course Request Verification Report is in the Build View and under Schedule TT in the school view.

- Student course requests are done in the Student TT >
    - Options > Multi Add Requests or
    - In an individual student Requests ST or
    - Bulk load students to a “package” of courses. Mass assign a package to a group of students
- Online student course requests is Module 5 - course requests through the portal