

# Staff Planner

#### Tool Search: Staff Planner

The Staff Planner allows schools the ability to establish the following boundaries as it relates to a teacher and a course:

- Teacher to Course Constraints how many courses a teacher can teach during the day.
- Teacher to Room Constraints where the teacher teaches those courses.
- Teacher Placement Constraints when the teacher teaches those courses.

Here, the teacher's maximum amount of periods taught, the maximum courses per term that are able to be taught (based on teacher contract), and the maximum consecutive periods taught can be entered, given a percentage of FTE for each teacher.

The Staff Planner tool that is available in the Scheduling Board is still available and can be used interchangeably with this new Staff Planner.

Submit feedback for the new Staff Planner by clicking the **Feedback** button in the bottom right hand corner of the tool. This takes you to the Campus Community Staff Planner forum topic where you can add your suggestions for the Staff Planner.

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Name         Filter by Department         Filter by All Hoc           Select Homa.         Social Studies © Science © ×         No Filter         •           Staff, Aaron   Social Studies © Science © ×         No Filter         •         •           Staff, Aaron   Social Studies © Science © ×         Nax Conrese: (7)         Max Conrese: (7)         Max Conrese: (7)         Team: None         FTE %: 100         Courses: 3 2700 Human Geography I 2706 U.S. Government         Min Sections: 0 3         Science © Science ( 3	^
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Staff, Aaron   Social Studies (09/07/2010) Staff, Aaron   Social Studies (09/07/2010) Max Courses: (7) Max Con Periods: (7) Team: Hone PTE %: 100 Courses: 3 2700 Human Geography 1 0 3 3 2700 Human Geography 1 0 1 Human Geography 1 Human Geography 1 0 1 Human Geography 1 Hu	^
Nax Periods: (?) Max Courses: (?) Max Con Periods: (?) Team: None PTE %: 10 Courses: 3 Min Sections: 0 A Max Sections: 9 Rooms: 0 3 2000 Junuan Goeggaphy 1 0 3 3 2000 Junuan Goeggaphy 1 0 0 Junuan Goeggaphy 1 Jun	^
Staff, Bailey         FE®4:00         FE®4:00         Gurses: 0         Max Sections: 0         Rooms: 0 </td <td></td>	
Max Periods: (7) Max Courses: (7) Max Con Periods: (7) Team: None FTE %: 100 Courses: 0 Min Sections: 0 Max Sections: 0 Rooms: 0 >	
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Max Periods: (7) Max Courses: (7) Max Courses: (7) Max Conserver: (7) Team: None FTE %: 100 Courses: 0 Min Sections: 0 Max Sections: 0 Recents: 0	
Staff, Darlene   Social Studies (08/30/1994)	
Max Periods: (7) Max Courses: (7) Max Con Periods: (7) Team: None FTE %: 100 Courses: 0 Min Sections: 0 Max Sections: 0 Rooms: 0	
Staff, Elliot   Social Studies (88/03/2017)	
Max Periods: (7)         Max Courses: (7)         Max Con Periods: (7)         Team: None         FTE %: 100         Courses: 0         Min Sections: 0         Max Sections: 0         Rooms: 0         Priode: 0	
Staff, Francine (1Science (19707/2010)	
Max Periods: (7)         Max Courses: (7)         Max ConPeriods: (7)         Team: None         FTE %: 100         Courses: 0         Min Sections: 0         Max Sections: 0         Rooms: 0	$\sim$
Batch Edit Staff Batch Edit Constraints Print C	

See the Staff Planner Tool Rights article for information about rights needed to use this tool.



- AFTER calendars for the next school year are created.
- AFTER enrollments have been rolled forward.
- AFTER student requests for next year are entered.
- BEFORE using the Course Planner (to make the constraints on the courses easier to manage and for all planning information to be used when building the courses and sections).

# **Navigation of Staff Planner**

A **Year, School** and **Calendar** (and **Structure** when applicable) MUST be selected in the Campus toolbar in order to display information.

When there are no active staff in the selected calendar, a warning message displays.

### **Locked Trial**

When viewing the Staff Planner for a Scheduling Trial that is currently locked (e.g., someone is working on that trial in the Scheduling Board), a banner displays at the top of the Staff Planner indicating such. This banner displays only when navigating to the Staff Planner from the outline (not using the quick access from the Scheduling Board.)

Changes made in Staff Planner in a locked trial cannot be saved.

	tern Administrator on 05/23/2023 129 PM	
SME New Integ Trial 0317	Staff Planner 🏠	Scheduling & Courses > Scheduling > Staff Planner
	The active trial for this Calendar/Schedule is currently open in the Scheduling Board by System Administrator, opened at 05/23/2023 1 21 PM. Editing is not allowed until the trial is closed to prevent data loss.	
	Filer v Book Schola	More Scheduling Tools Course Planner Scheduling Board
	Locked Trial Indicator	

### **Filter Options**

Use the **Filter by Name**, **Filter by Department** and **Filter by Ad hoc** options to assign courses and rooms for a particular staff person, for an entire department or for a previously created list (in Filter Designer) of staff. Begin typing in the field by entering a last name, a first name, a letter in a name, the start of a department name, etc. Matching results display and are further refined as more letters are entered. A message displays when no matching results are found.

Staff Planner 🛧		
Filter by Name	Filter by Department	Filter by Ad Hoc
Select items	Social Studies Science I	No Filter
Staff, Aaron   Social Studies (09/07/201	0] Math	
Max Periods: (8) Max Courses: (8)	Media	FTE %: 100 Courses: 0
Staff, Bailey   Science (09/07/2010)	Music	
Max Periods: (8) Max Courses: (8)	Physical Education	FTE %: 100 Courses: 0
Staff, Cameron   Social Studies (08/30/		~

Click the Filter toggle arrow up or down to show or hide the filter options.

- **Filter by Name**. When a staff person is selected here, only that person's information displays. This is helpful when the staff person has specific constraints for their course schedule, maybe the prep period needs to be at a certain time or their courses can only meet in a particular room. Choose the staff person by expanding the dropdown list or by typing the first or last name of the staff person.
- **Filter by Departmen**t. Multiple departments can be selected at one time. Only those staff who are assigned to a particular department are listed. This allows planning for ALL staff members for English or Science, for example. Departments must be created and Departments must be assigned to the staff person's District Assignment.
- **Filter by Ad hoc.** Filters created in Filter Designer using the Data Type of Census/Staff are available for selection. Any staff person who included in the selected filter and who has an active employment record in the selected school and calendar display.

Selected Filter By options remain when navigating to other tools for the next time the Staff Planner is accessed.

For staff who are assigned to multiple departments in the same school, the departments are listed by the start date of the District Assignment, with the earliest start date first. In the following image, the teacher Aaron Staff has two District Assignments for the same high school - one for Science with a start date of August 2013 and one for English with a start date of August 2007. The Science department is listed first because he has a teaching assignment for Science that is five years before his English teaching assignment.

Filter A Show Details			
ilter by Name	Filter by Department	Filter by Ad Hoc	
Select items	English 🔇	× No Filter	•
English (	08/27/2007) Science (08/27/2013)		
en Bariadas (C			Min On
	ssignments 🏠		Min See
Staff, Aaror	L DOB: 04/12/1981		
New D	ocuments		
Assignm	ents		
- High Sc	1001		
	nce - (08/27/2013-) ish - (08/27/2007-)		

Since the Department assignment is optional, teachers who are not assigned to a department are listed in alphabetical order by name with the start date of their District Assignment in parentheses.

Staff Planner ☆									
Fitter A Show Details									
Filter by Name	er by Name Filter by Department Filter by Ad Hoc								
Select items	Select items			No Filter 🔹					
Staff, Kevin   (08/18/2016)									
Max Periods: Max Courses: Max	Con Periods:	Team: None	FTE %: 100	<ul> <li>Courses: 3</li> <li>0118 Approaches to Learning 9 I</li> <li>0120 Approaches to Learning 10 I</li> <li>0150 Executive Skills Strategies I</li> </ul>					
Staff, Lin   Special Education (08/22/20	)18)								
Max Periods: Max Courses: Max	Con Periods:	Team: None	FTE %: 100	Courses: 0					
Staff, Manuel   (08/18/2016)   (01/3	1/2022)								

Staff Planner - No Department Assigned

When a teacher has active District Assignments at multiple schools, only the information for the school selected in the Campus toolbar (Context Switcher) is listed.

## **Show Details**

Infinite 🔿 🦯



Move the **Show Details** setting to **OFF** to display just the totals of the courses, sections and rooms for each staff person. Move the setting to **ON** to show the names of the courses assigned to the staff person, the number of sections for each course, and in which room the section meets.

Staff Planner 🏫							Schedul	ng & Courses > Scheduling	> Staff Plur
Filter A Show Det	alic )								
Filter by Name		by Department	Filter by Ad Hoc						
Select items	Set	lect items	No Filter		<b>•</b>				
Staff, Aaron I Spe	cial Education (04/01/1999)	Special Education (08/31/20	15)						STRICTIONS
Max Periods:	Max Courses:	Max Con Periods:	Team: None	FTE %: 100	Courses: 1 0009 Skills Seminar A.I (Academic)	Min Sections: 0 0	Max Sections: 3 3	Rooms: 1 0111 (1)	
staff, Bailey   (08	/18/2016)							PLACEMENT R	STRICTIONS
Max Perioda:	Mex Courses:	Max Con Perioda:	Team: None	( <b>) mes</b> enoo	Coursest 3 0118 Approaches to Learning 91 0126 Approaches to Learning 101 01561 Executive Skills Strategies 1	Min Sections: 0 0 0 0	Max Sections: 9 3 3 3	Rooms: 9 0113 (2) 0114 (1)	
Staff, Cameron I	Special Education (08/22/20	018)							
tax Periods:	Max Courses:	Max Con Periods:	Team: None	FTE %: 100	Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	
Staff, Darlene 10	00/10/2016)   (01/91/2022	)							
Max Periods:	Max Courses:	Max Con Periods:	Team: None	FTE %: 100	Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	
Staff, Erik   Social	Studies (09/07/2010)								
Max Perioda:	Max Dourses:	Max Con Perioda:	Team: None	ITTE Nº 100	Courner: 1 2700 Human Geography I 2702 U.S. History I 2706 U.S. Covernment	Min Sections: 0 0 0 0	Max Sections: 9 3 3 3	Rooms: II	
Staff, Francine	(03/15/2021)								
Anx Perioda:	Max Courses:	Max Con Perioda:	Team: None	FTE %: 100	Courses: II	Min Sections: 0	Max Sections: 0	Rooms: 0	
Staff, George Ar	t (08/20/2020)								
dax Periods:	Max Courses:	Max Con Periods:	Team: None	FTE %: 100	Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	
Prim	- ellek fon om onort i neles	/00/03/03/01							

### **More Scheduling Tools**

Access the **Course Planner** and the **Scheduling Board** from the Staff Planner by clicking either of the options in the upper right corner.

This ONLY displays when navigating to the Staff Planner FROM the Scheduling Board. When opening Staff Planner from the index, More Scheduling Tools DOES NOT display.

Filter A Show Details							More Scheduling Tools Course Planner S	
Filter by Name Select items	Filter by Department		ilter by Ad Hoc No Filter	T				
Staff, Aaron   Social Studies (09/0	7/2010)							
Max Periods: (8) Max Courses:	(8) Max Con Periods: (8)	Team: None	FTE %: 100	Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	
Staff, Bailey   Science (09/07/2010	))							

Access to Course Planner and Scheduling Board

# **Action Bar Options**

Across the bottom of the Staff Planner is the Action Bar. Available is the ability to print staff information and to view the Staff Planner in full screen mode.



Staff, Cameron	Science (09/07/2010)			
Max Periods: (7)	Max Courses: (7)	Max Con Periods: (7)	Team: None	FTE %: 100
Staff, Darlene 18	ocial Studies (08/30/1994)			
Max Periods: (7)	Max Courses: (7) Max Con Periods: (7) Team: No			FTE %: 100
Staff, Elliot   Socia	al Studies (08/03/2017)			
Max Periods: (7)	Max Courses: (7)	Max Con Periods: (7)	Team: None	FTE %: 100
Staff, Francine	Science (09/07/2010)			
Max Periods: (7)	Max Courses: (7)	Max Con Periods: (7)	Team: None	FTE %: 100
Batch Edit Staff B	atch Edit Constraints Print	<b>1</b>		

Staff Planner Action Bar

The **Batch Edit Staff** option adds or replaces the values for the staff information that displays on the main view of the Staff Planner.

It is recommended that Filter options be added prior to using this option.

The **Batch Edit Constraints** option allows the updating of courses, rooms, and placement restrictions for the staff person's assigned courses.

After filtering the list of staff to an entire department or a single staff person, for example, set constraints to set the minimum and maximum section numbers for courses, or set the room for a particular staff person to always teach in room 100, or to not have any Social Science teachers teach a section during first period for a monthly staff meeting.

It is recommended that Filter options be added prior to using this option.



Batch Edit Staff Information

Staff Pla	inner 🏠			
Filter 🗸	Batch Edit Staff Constraints			
Staff, Aa Max Period	26 filtered records will be affected. Including a Constraint section with Collapse All	no selections will delete existing data when using Repl	ace.	
	- Course Constraints			
Staff, Be	년 Include			
Max Perioc	Add or remove a course by selecting its name. Filter by Course Number, Name or Department			
	geog	×		
Staff, Ca	COURSE	DEPARTMENT	MIN	MAX *
Max Perioc	✓ 2700 World Geography	Social Studies	0	3
	✓ 2701 World Geography	Social Studies	0	3
Staff, Dy	2840 AP Human Geography 9 I	Social Studies	(0)	
Max Perioc	2841 AP Human Geography 9 II	Social Studies		
	2943 Geography 1 (A)	A School	(0)	
Staff, Ell	+ Room Constraints			
Max Perioc	+ Placement Restrictions			
Batch Edit	Add Replace Remove Cancel			

Batch Edit Constraints for Staff



A .csv export of the Staff Planner grid can be generated by clicking the **Print** button. It lists the same information that displays in the grid, but in spreadsheet format.

The Staff Planner can be viewed in full screen if needed. Click the **Full Screen** button to remove Campus toolbar and tool header, as well as the Campus outline.

Click the button again or use the ESC key to return to standard view.

Max Periods: (8)	Max Cour	ses: (8) Max Con Periods: (8)	FTE %: 100			Courses: 4 4100 Physical Scien 4130 Physical Scien 8300 MS Office Appl 8320 MS Office Appl	ce B ications I		Min Se	0 0 0 0 0	Max Sections: 1	10 Rooms 3 3 3 1	•
Staff, Baile	A. A.	В	С	D	E	F	G	н	1	J	K		
Max Periods: (	1 Teacher Name 2 Staff, Aaron	Departments Science (11/27/2017)	Max Periods	Max Courses	Max Con Period		Int Course	4 Min Section 4		Rooms	Placement Constraints	Course Names Physical Science A   Physic	
Harr three (	3 Staff, Bailey	Social Studies (07/26/2017)   (08/27/2018)					100		0 10			AP Statistics   AP Calculus	al science b   M
Staff, Cam	4 Staff, Cameron	Science (06/26/2022)	8				100					Pr statutes   Pr carcatas	
	5 Staff, Darlene	Social Studies (12/11/2010)	8	5			100	1	0 3			H Geography	
Max Periods: 1	6 Staff, Erik	Social Studies (12/11/2010)	8	8			100		0 5	0		AP World History	
	7 Staff, Francine 8 9	Science (12/11/2010)	8	8		8 :	100 :	5	0 15	(	)	Human Anatomy   Human	Physiology   En

🖕 🔶	3	Staff Plann	er 🖈						Scheduling & C	Courses > Schedulin	> Staff Planner	
		Filter by Name:		Filter by Depe	rtment:					Show De	uite:	
Main Menu		Select items		Science (	Social Studies O	×				(m)		
nstruction	,	Staff, Aaron	Filler by Rane. Select Remo.,		Filter by Department.	when O	×					Deer Defails
itudent Information	•	Max Periods: (8	Staff, Aaron   Science									
	•		Max Periodic (II)	Mail Courses: (1)	Max Con Ferledic (II)	FTE N: 100		Courses: 4 4300 Physical Science A 4350 Physical Science II 8300 MS Office Applications I		Min Sections: 0 0 0 0	Max Sections: 10 3 3 3	Rooma: 0
	· · ·	Staff, Bailey						8229 MS Office Applications II			1	
	•		Staff, Balley   Social Max Periods: (II)	Studies (37/25/2017)   (35/27 Mat Courses: (1)	(2018) Max Can Pariada; (8)	FIE N: 102		Courses: 2		Min Sections: 1	Max Sections: 0	Foome: (
	<i></i>	Max Periods: (8	Hart Parton, (1)	max coverage, (v)	and Contraction (1)	100		1001 AP Barbins 1050 AP Calculus		0	3	
imployee Self Service	•	Staff Gorie	Staff, Cameron 15c									
ees			Max Periodic (1)	Max Courses: (5)	Max Cen Periode: (II)	FTE N: 100		Courses: 0		Min Sections: 0	Max Sections: 0	Rooms: 0 >
		Max Periods: (8	Staff, Darlene 1800									
RAM		Staff, Darler	Mox Periods: (II)	Max Courses: (5)	Max Cen Periodo: 00	PTE N: 100		Gourses: 1 2301 H Geography		Min Sections: 0 0	Max Sections: 3 3	Recenci 0
irading & Standards	•	Max Periods: (8	Staff, Erik   Social St	dies (12/11/2010)								
	, ,	Staff, Erik	Mox Periode: (II)	Max Courses: (0)	Max Can Periodic (II)	FTE N: 100		Courses: 1 2700 AP Multi History		Min Sections: 0 0	Max Sections: 5 5	Roome 1
Wy Account		Max Perioda: (2	Staff, Francine 190									
Reporting			Max Periodic (I)	Mag Courses: (I)	Max Can Periodic (II)	FTE N: 100		Courses: 5 4540 Human Anafomy 4545 Human Physiology		Min Sections: 0	Mas Sections: 15 3	Roome: 0
		Staff, Franc						4555 Human Physiology 4555 Environmental Science 4555 Hosculture Science			3	
Scheduling & Courses	· ·	ax Periods: (0						4500 Glotochrology				
							4540 Human Anatomy 4545 Human Physiology			3		
		Print C										

# **Staff Planner Logic**

When selecting a room for a placed Section, the logic in the build process used in the Scheduling Board follows this order:

- 1. Selects the Room from Staff Planner when Rooms are designated in both Course Planner and Staff Planner, AND the Room for the Section to Build appears in both Planners.
- 2. Selects the Room from Course Planner when Rooms are designated in both Course Planner and Staff Planner, AND the Room for the Section to Build appears only in the Course Planner.
- 3. Selects the Room from Course Planner when Rooms are designated in only the Course Planner.
- 4. Selects the Room from Staff Planner when Rooms are designated in only the Staff Planner.
- 5. When Rooms are not designated in either Planner, a room is not automatically assigned for the section.

Rooms assigned a Room Type list that room type in parentheses.

# **Staff Planner Layout**

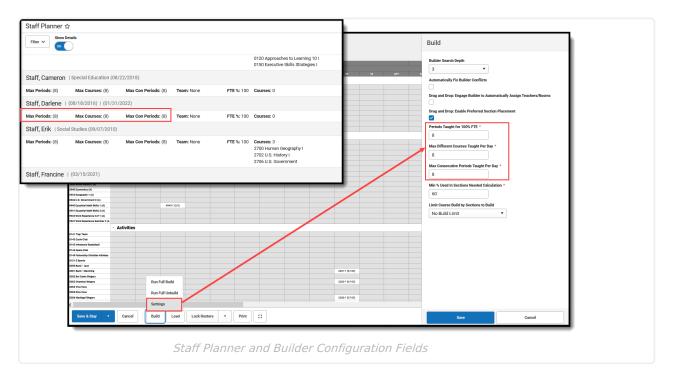
The Staff Planner lists the names of teachers alphabetically who have an active District Assignment record with the Teacher checkbox marked in the selected school. Dates of the teacher's active district assignment record(s) display after their name in parentheses.

te ampus									
Filter A Show Details CR Filter by Name Select items		Filter by Department Social Studies ⊘ Science €		Filter by Ad Hoc No Filter	T			More Scheduling Tools Course Planner Schedulin	ig Board
Staff, Aaron   Social Stud Max Periods: (8) Max	lies (09/07/2010) « Courses: (8)	) Max Con Periods: (6)	Team: None		Courses: 3 2700 Human Geography I 2702 U.S. History I 2706 U.S. Government	Min Sections: 0 0 0	Max Sections: 9 3 3 3	Rooms: 0	>
Staff, Bailey   Science (09									
Max Periods: (8) Max Staff, Cameron   Social S	Courses: (8)	Max Con Periods: (8)	Team: None	FTE %: 100	Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	<b>``</b>
	Courses: (8)	Max Con Periode: (8)	Team: None	ETE %: 100	Courses: 0	Min Sections: 0	Max Sections: 0	Pooms: 0	
					Planner Layo				_

### **Main View**

The main view of Staff Planner lists the maximum amount of periods and courses a staff person can teach, based on the teacher's contract and/or district requirements.

The first three fields on the Staff Planner are pulled from the Builder Configuration tool in the Scheduling Board. Default values are noted in the parentheses, but they can be modified in the side panel. Click the **Expand** section below for descriptions of all listed fields.



#### Click here to expand...

Fields	Description	<b>Builder Configuration Field</b>
Max Periods	Maximum number of instructional periods the teacher can teach during the day.	Periods Taught for 100% FTE defaults to this number, but can be modified



Fields	Description	Builder Configuration Field
Max Courses	Maximum number of courses in instructional periods the teacher can teach during the day.	Maximum Different Courses Taught per Day
Max Consecutive Periods	Maximum number of consecutive instructional periods the teacher can teach during the day. This reflects a negotiated or preferred number of courses a teacher is allowed to teach in a row without a prep period/other break.	Maximum Consecutive Periods Taught per Day
Team	Scheduling Team assigned to the teacher. When a teacher is assigned to teach a course section with a specific Scheduling Team assigned, that value is pushed to the course section when the teacher is assigned as the Primary Teacher in the Scheduling Board, either manually or via the auto-build configuration. When there are NO Teams/Scheduling Groups created for the school, this column does not display.	N/A



Fields	Description	<b>Builder Configuration Field</b>
FTE	DescriptionFull-Time Equivalent. This value is automatically calculated from the Max Periods field divided by the Max Courses field.It is possible to have FTE greater than 100%. When a school day is 8 periods, but a teacher is required to be on site after the end of the day for an additional hour, the teacher's Max Periods would be 9, making their FTE be 112%.Each district defines full time employment as something different. Some districts require teachers to teach all periods of the day, while others give teachers a prep period and each course taught calculates the FTE value of the staff person.When a teacher has a contract that allows a prep period, the maximum periods taught may be one less than the total instructional periods in the school day. This would also mean that the number of courses that can be taught is reduced by that prep period.	Builder Configuration Field Max Periods divided by the default value of Periods Taught for 100% (whatever shows in parentheses)
	When a course section spans multiple periods, each period associated with that section is included in this value. Courses taught is not the same as Sections taught. A teacher may be teaching two	
	different courses, but each one has 3 sections throughout the day. The FTE fields on the District Assignment and the District Employment records ARE NOT THE	
Courses	SAME AS and DO NOT affect this field. Number of courses that are currently assigned to the teacher.	N/A

Fields	Description	<b>Builder Configuration Field</b>
Min Sections	Least amount of sections that can be assigned to the teacher.	N/A
Max Sections	Most amount of sections that can be assigned to the teacher.	N/A
Rooms	Number of different rooms that are assigned to the course sections for the teacher.	N/A

## **Staff Planner Side Panel**

Click anywhere on that row or click the chevron at the end of the row by Rooms to display more information about the teacher's courses. Use the fields on this side panel to modify the information.

Staff Planner ☆			Scheduling &	Courses > Scheduling > Staff Planner	
Filter A Show Details				More Scheduling Tools Course Planner Scheduling Board	
Filter by Name Filter by D	partment Filter by Ad Hoc			Course Planner Scheduling Board	
	Studies Science X No Filter	•			
Staff, Aaron   Social Studies (09/07/2010)	Staff, Aaron   Social Studies				
Max Periods: 4 Max Courses: 4 M	Max Periods Max Courses Max Consecutive Periods Team           Max Periods         Max Courses         Max Consecutive Periods         Team           Image: Transmission of the security of	×			Collapse All
	- Courses & Rooms				
Staff, Beth   English (08/27/2007)   Science (08/	Add or remove a course or room by selecting their course name/roo	om number.			
Max Periods: 4 Max Courses: 4 M	Filter by Course Number, Name or Department			Filter by Room or Room Type	
1	geog	×			
	COURSE	DEPARTMENT	MIN MAX*	ROOM	PRIORITY*
	✓ 2700 World Geography	Social Studies	1 2	✓ 0172	1
	✓ 2701 World Geography	Social Studies	1 4	✓ 0173	2
	✓ 2702 U.S. History	Social Studies	1 1	✓ 0174	3
	2840 AP Human Geography 91	Social Studies	(0) (0)	0110 (period1)	
	2841 AP Human Geography 9 II	Social Studies	(0) (0)	Test (period1)	
	2943 Geography 1 (A)	A School	(0) (0)	0111	

Clicking the headers of the Course Number/Name/Department, Minimum/Maximum, or the Room/Priority tables does nothing.

### **Collapse or Expand Staff Planner Cards**

Use the **Expand All** button to show the detail of the Courses & Rooms card and the Placement Restrictions card. When adjusting the max periods/courses values for several teachers, it may be easier to leave those cards in their collapsed state. The cards can be expanded one at a time by clicking the plus sign. Once either card is expanded, the Expand All button changes to read **Collapse All**.

Staff, Da	irlene   S	Special E	Education	n		
	e Periods	Max Course	s Max Cons	ecutive Period	Team D •	Collapse All
Courses	& Rooms					
Placeme	nt Restrictio	ns				
Click or		strict staff		Select an enti	row or column by clicking the header.	
_	Q1 1	Q2 1	Q3 1	Q4 1		
00	0					
01		$\otimes$				

When saving information on the side panel, there are three options:

- Save & Next. Saves the modified data on the selected teacher and then moves to the next teacher in the list, based on any filtering of staff from the main view. The next staff is also listed in the far right corner of the side panel. Save & Next is the default save option, unless the last course in the list is displayed, is which case Save & Next is not available.
- Save & Stay. Saves the modified data on the selected teacher and then remains on that teacher for further updates.
- **Save & Close**. Saves the modified data on the selected teacher and then closes the side panel, displaying the main Staff Planner view.

To not save any changes made in the side panel, click the **Cancel** button.

# Change Max Periods, Max Courses, Max Consecutive Periods Values

On the Main Staff Planner view, the teacher's current settings of periods, courses and consecutive periods display. Those in parentheses are the default values from the Builder Configuration settings for the active trial; values not in parentheses indicate the original value has been adjusted in the Staff Planner.

Staff, Aaron IS	pecial Educa Adjusted va	lue in Staff Planner UCAtio	n (08/31/2015)		
Max Periods: 5	Max Courses: 7	Max Con Periods: 6	Team: D	FTE %: 100	Courses: 1 0003 Skills Seminar A I (Academic)
Staff, Bailey   (	08/18/2016)				
lax Periods: 7	Max Courses: 7	Max Con Periods: 7	Team: None	FTE %: 100 Default Values from Buil Configuration	Courses: 3 0118 Approaches to Learning 9 I ) Approaches to Learning 10 I der ) Executive Skills Strategies I
Staff, Cameron	Special Education (08	/22/2018)			
lax Periods: (8)	Max Courses: (8)	Max Con Periods: (8)	Team: None	FTE %: 100	Courses: 0
Staff, Darlene	(08/18/2016)   (01/31	/2022)			
lax Periods: (8)	Max Courses: (8)	Max Con Periods: (8)	Team: None	FTE %: 100	Courses: 0

- 1. Open the side panel by clicking in the row or clicking the caret on the far right side of the row for the appropriate teacher.
- 2. Enter the appropriate values for the selected teacher for **Max Periods, Max Course, Max Consecutive Periods** by typing in the field.
- If this is the only update that needs to be made, click the Save & Next, Save & Stay or Save & Close button. Otherwise, continue making adjustments for this selected staff person.

Staff Planner 🌣	Scheduling & Courses > Scheduling > Staff Planner
Fiber A Allen, Briana K   Special Education	
Filter by Nar         Max Periods         Max Courses         Max Consecutive Periods         Team           Select Itte         (b)         (b)         (c)         (c)	Expand All
Staff, Ai + Courses & Rooms	
Max Perio + Placement Restrictions	
Staff, B:	
Adjusting Max Periods, Courses, Consecutive Periods Valu	les

### **Team Selection**

Teams (Scheduling Groups) are assigned to a Course Section. A Team can be selected from the dropdown on the Staff Planner Side Panel. This team selection is then pushed to the Course Section when the course is built in the Scheduling Board.

Scheduling Groups must be available in the selected calendar to assign them to a staff person.

Select the appropriate team from the dropdown. Click one of the save options when finished.

0	(8)	(8)	(8)	D	•
Cours	ses & Rooms			A	
Add	or remove a	course or room	by selecting their course		
Filter	r by Course Nur	mber, Name or De	partment	c	
				D	
	COURSE			F	~

On the main view of the Staff Planner, use the Team Filter Option to display only those staff who have been assigned to the selected Team.

The Team assigned here also displays in the Scheduling Board on the Section Side Panel.

#### **Course and Room Selection**

The Courses & Rooms card lists all active courses in the selected calendar and a list of all AVAILABLE rooms displays. Courses are listed in course number order. Both courses and rooms can be narrowed to a smaller list by entering text in the Filter fields.

dd or remove a course or room by selecting their cou	irse name/room number.			
ter by Course Number, Name or Department			Filter by Room or Room Type	
geog	×			
COURSE	DEPARTMENT	MIN MAX*	ROOM	PRIORITY*
<ul> <li>2700 World Geography</li> </ul>	Social Studies	1 2	✓ 0172	1
<ul> <li>2701 World Geography</li> </ul>	Social Studies	1 4	✔ 0173	2
<ul> <li>2702 U.S. History</li> </ul>	Social Studies	1 1	✓ 0174	3
2840 AP Human Geography 9 I	Social Studies	(0) (0)	0110 (period1)	
2841 AP Human Geography 9 II	Social Studies	(0) (0)	Test (period1)	
2943 Geography 1 (A)	A School	(0) (0)	0111	

- The list of courses can be filtered by the Course Name, Course Number or Department.
- The list of rooms can be filtered by the Room Name or Room Type. When creating rooms, a Name is required entry, but a Room Type can also be added. Room Types are created in the Attribute/Dictionary and are more descriptive than just a room number or name. It could be LAB or GYM or POOL, for example. When a school has multiple labs or multiple gyms, the Room Type would be LAB and the Room Number might be LAB A.

The filter fields are dynamic, meaning any text entered into them instantly filters to list matching results.

#### **Assign Courses to the Teacher**



- 1. Expand the Courses & Rooms card.
- 2. Filter the Courses and Rooms, if desired.
- 3. Click anywhere in the row for the course to assign it to the teacher. A blue checkmark displays next to a course when it has been assigned, and the MIN/MAX fields populate automatically.
- 4. Modify the **MIN/MAX** value as needed for this staff person. These values are required.
- 5. Assign all courses here at one time.
- 6. Click one of the **Save** options when needed.

#### **Assign Rooms to Selected Teachers**

- 1. Filter the list of rooms to those appropriate for the selected courses.
- 2. Select the desired rooms for the teacher's courses by clicking in that room row. A blue checkmark displays next to selected rooms. When more than one room is selected for a particular course, or there are several rooms in which the teacher can teach that course, select all appropriate rooms and add a priority. Priority is also automatically assigned; a value of 1 indicates that is the preferred room and was selected first.
- 3. Click one of the **Save** options when needed.

#### **Placement Restrictions**

The Placement Restrictions section creates a constraint on that period and term. This restriction can be for a selected period, a term or a schedule, or a combination of each. The restriction indicates a section is not placed in that period, schedule, or term.

Use the **Filter by Term** field to change the schedule grid to only display the entered Term number. Use the **Filter by Period Schedule** to only display that particular period schedule. Or, use them together to only display Term 3 and the Daily Period Schedule. These filter selections remain when moving to the next staff person.

Filter	by Term	Filter by Period Schedule	
3 🔇	×	Daily 😣	×
Click	on a box to restrict staff place	Daily	ig the header.
	3 Daily	2 HR Late Start	
0	Daily	Assembly	
1		Testing	
2		-	
3		-	
4		-	
5		-	



When a restriction is added, the No Symbol ( $\bigcirc$ ) is added to the period. Restrictions can be added for a period across all terms by clicking the period number row (image 1); to a period schedule by clicking that schedule name (image 2); for an entire term by clicking the term number (image 3); for a single period (image 4).

ick o	n a box to	restrict staff	placement. S	Select an enti	ire row or c	olumn by clic	king the hea	der.									
ter by	Term		Filter by Per	riod Schedule													
			1		2			3			4 Daily 2 HR La Assembly Testing			]			
	Daily	2 HR La	Assembly	Testing	Daily	2 HR La	Assembly	Testing	Daily	2 HR La	Assembly	Testing	Daily	2 HR La	Assembly	Testing	
0																	
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1. Period Restriction

er by	Term		Filter by Per	iod Schedule												
			1				2				3					
)	Daily	2 HR La	Assembly	Testing	Daily	2 HPLa	Assembly	Testing	Daily	2 HR La	Assembly	Testing	Daily	2 HR La	Assembly	Testing
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2						0										
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0 1 2

			iod Schedule												
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Daily	2 HR La	Assembly	Testing	Daily	2 HR La	Assembly	Testing	Daily	2 HR La.	messembly	Testing	Daily	2 HR La	Assembly	Testing
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									-	-					
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								-							
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						3. Te	rm Re	estrict	tion						
t Restricti	ions														
box to re	estrict staff p	lacement. Se	lect an entir	e row or co	umn by click	ing the head	er.								
	t Restrict	t Restrictions	t Restrictions	Image: state	1       1       1       1         2       2       2       2         2       2       2       2         2       2       2       2         2       2       2       2         2       2       2       2         2       2       2       2         2       2       2       2         2       2       2       2         2       2       2       2         2       2       2       2         2       2       2       2         3       3       3       3         4       2       3       3         4       2       4       4         5       3       4       4         4       4       4       4       4         5       4       4       4       4         6       4       4       4       4         6       4       4       4       4         6       4       4       4       4         6       4       4       4       4 <td< td=""><td>Image: Section set in the sectin the sectin the sect in the sectin the section set in the sectin</td><td>Image: Image: Image:</td><td>3. Term Re</td><td>Image: Second second</td><td>Image: Image: Image:</td><td>Image: Image: Image:</td><td>Image: Image: Image:</td><td>Image: Image: Image:</td><td>Image: Image: Image:</td><td>Image: Image: Image:</td></td<>	Image: Section set in the sectin the sectin the sect in the sectin the section set in the sectin	Image:	3. Term Re	Image: Second	Image:	Image:	Image:	Image:	Image:	Image:

4. Single Period Restriction

To remove the symbol, click in that cell again.

Restrictions are added for any period schedule or term that is not displayed due to filtering by term or schedule. When saved, a validation message displays to alert the user that changes were made to hidden terms/period schedules.

	nent Restrictio					
	on a box to res y Term	strict staff p		iod Schedule	v or column by clicking the header.	
	1 Testing	2 Testing	3 Testing	4 Testing	Warning	×
0	<b>y</b>	J			Changes have been made to hidden Terms or Po	riod Schedules. Are you sure
1			$\otimes$		you want to save without viewing?	
2			$\otimes$		Don't show again.	
3			$\otimes$			Save Cancel
4						
5						

## **Previous and Next Staff**

When finished adding courses, rooms and adding placement restrictions, use the **Previous** and **Next** buttons in the bottom right to add courses, rooms and placement restrictions to other staff without leaving the Side Panel view. Changes do need to be saved before viewing another staff person.

3       4       5       6       7       8       ACT		
Save & Next  Cancel	< Prev - Staff, Darlene A Staff, Erik - Next >	1
	Previous and Next Buttons	-

# Modify Staff Planner Information Using Batch Functionality

Prior to using either of the Batch Edit options, **filter** the list of courses in the selected calendar to a limited number using one or all of the available Filter options - by Course Number or Name, by Department or by Ad hoc. Then, the batch process affects a limited number of records.

taff Planner ☆					Scheduling & Courses > Scheduling > Staff F	
Filter A Show Details					Batch Edit Staff Information	
ter by Name	Filter by Department		Filter by Ad Hoc		26 filtered records will be affected. Including a field with no Fill Val	Je
Select items	Social Studies 🕲	Science 🔇	× No Filter	•	will delete existing data when using Replace.	
taff, Aaron   Social Studies					Max Periods Include Fill Value (7)	
ax Periods: (7) Max Cours	IS: (7) Max Con Periods: (7)	Team: None	FTE %: 100 Courses: 3 2700 Human Geography I 2702 U.S. History I 2706 U.S. Government	M 0 0 0	Market Courses Include Fill Value	
taff, Bailey   English (08/27	/2007)   Science (08/27/2013)				Max Consecutive Periods Include Fill Value	
ax Periods: (7) Max Cours	es: (7) Max Con Periods: (7)	Team: None	FTE %: 100 Courses: 0	м	м 🗆 (7)	
taff, Cameron   Science (0	9/07/2010)				Team Include Fill Value	
ax Periods: (7) Max Cours	es: (7) Max Con Periods: (7)	Team: None	FTE %: 100 Courses: 0	м	M 🗆	<b>.</b>
	c (08/30/1004)					- 1

These two Batch Edit options replace the following tools:

- Request and Rosters
- Related Staff Planner Tools in the Scheduling Board

## **Batch Edit Staff**

The same values that can be modified on the Staff Planner Side Panel for one staff member can also be modified for multiple staff members using the Batch Edit Staff option.

Staff Planner 🏠		Scheduling & Courses > Scheduling > Staff Planne
Filter A Staff, Aaron   Social Studies		
Filter by Na Select ib 0 (7) (7) (7) (7)	Team v	Collapse All
Staff, A     - Courses & Rooms       Max. Perit     Add or remove a course or room by selecting their cours       Filter by Course Number, Name or Department     social studies	Batch Edit Staff Information 26 filtered records will be affected. Including a field with no Fill Value will delete existing data when using Replace.	Filter by Room or Room Type
Staff, B         course           Max Perk         ✓ 2700, Human Geography I           Staff, C         ✓ 2702, U.S. History I	Max Periods Include Fill Value  (7)  Max Courses Include Fill Value  (7)  (7)  (7)  (7)  (7)  (7)  (7)  (7	ROOM         PRIORITY*           0110 (period1)
	Max Consecutive Periods Include Fill Value	aff

When adding values to the fields in the side panel, make sure the **Include** checkbox is marked. This selection ensures the item is updated with the entered value. Also note that when Include is marked but the Fill Value is not populated, existing information is replaced with no value (e.g., the value is deleted).

### Add Staff Information

Adding staff information ADDS the entered values to the filtered staff list who do not already have



values entered (other than the default value). For example, all Social Studies teachers are currently assigned just the default values for Maximum Periods, Maximum Course, Maximum Consecutive Periods and no Team assigned. Using Batch Edit Staff to ADD a value of 4 Maximum Periods, Maximum Courses, 2 Maximum Consecutive Periods, and align them to Team D updates the filtered staff list for these new values.

- Click Batch Edit Staff in the Action Row. The Batch Edit Staff Information side panel displays.
- 2. Enter the desired value for each listed field. Not every field needs to have a value.
- 3. Mark the **Include** checkbox to apply the entered value to the field.
- 4. Click the **Add** button. The Staff Planner processes and when complete, the new values are added for each staff member included in the filtered list.

Staff Planner 🏠				Scheduling & Course	s > Scheduling > Staf	ff Planne
Filter A Show Details					Scheduling Tools	
	The ball and the second			Co	urse Planner Scheduling	Board
Filter by Name Select items	Social Studies 3         Science 3	Filter by Ad Hoc  No Filter				
Staff, Aaron   Social Studies (09/07/201						
Max Periods: (7) Max Courses: (7)	Max Con Periods: (7) Team: None	FTE %: 100 Courses: 3 2700 Human Geography I 270 Liss Histony I 270 (2700 Human Geography I)	Min Sections: 0 0 0 0	Max Sections: 9 3 3 3	Rooms: 0	>
Staff, Bailey   English (08/27/2007)   Sc	cience (08/27/2013)					
Max Periods: (7) Max Courses: (7)	Max Con Periods: (7) Team: None	FTE %: 100 Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	>
Staff, Cameron   Science (09/07/2010)						
Max Periods: (7) Max Courses: (7)	Max Con Periods: (7) Team: None	FTE %: 100 Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	>
Staff, Darlene   Social Studies (08/30/1	994)					
Max Periods: (7) Max Courses: (7)	Max Con Periods: (7) Team: None	FTE %: 100 Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	>
Staff, Elliot   Social Studies (08/03/2017	7)					
Max Periods: (7) Max Courses: (7)	Max Con Periods: (7) Team: None	FTE %: 100 Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	>
Staff, Francine   Science (09/07/2010)						
May Doriorle: (7) May Coureoe: (7) Batch Edit Staff Batch Edit Constraints	May Con Pariote: (7) Taam: Nona Print	ETE %: 100 Courses: 0	Min Sections: 0	May Sections: 0	Poome: 0 Feedba	ack 🗩

### **Replace Staff Information**

Replacing staff information UPDATES the entered values for the filtered list of staff where values already exist. For example, the Social Studies teachers are currently assigned 4 Max Periods, 4 Max Courses, 2 Max Consecutive Periods and are assigned to Team D. Using Batch Edit Staff to REPLACE the Max Consecutive Periods value of 2 updates that value for the staff included in the filtered list of staff to 3.

When there is existing data for staff, using Replace OVERWRITES that data and replaces it with the newly entered values.

When replacing values to the fields in the side panel, make sure the **Include** checkbox is marked. This selection ensures the item is updated with the entered value. Also note that when Include is marked but the Fill Value is not populated, existing information is replaced with no value (e.g., the value is deleted).



- Click Batch Edit Staff in the Action Row. The Batch Edit Staff Information side panel displays.
- 2. Enter the desired value for each listed field. Not every field needs to have a value.
- 3. Mark the **Include** checkbox to apply the entered value to the field.
- 4. Click the **Replace** button. The Staff Planner processes and when complete, the values are replaced for each staff member included in the filtered list.

Staff Planner 🕯	<u>ት</u>							Scheduling & Course	s > Scheduling	> Staff Planner
Filter A Show D									Scheduling Tools urse Planner Si	
Filter by Name		Filter by Department		Filter by A	d Hoc					
Select items		Social Studies 🕲	Science 🕲	K No Filte	er 🔻					
Staff, Aaron 180	ocial Studies (09/07/20									Ŷ
Max Periods: 4	Max Courses: 4	Max Con Periods: 2	Team: D	FTE %: 100	Courses: 3 2700 Human Geography I 2702 U.S. History I 2706 U.S. Government		Min Sections: 0 0 0 0	Max Sections: 9 3 3 3	Rooms: 0	>
Staff, Bailey   Er	nglish (08/27/2007)   Se	cience (08/27/2013)	1	à						
Max Periods: 4	Max Courses: 4	Max Con Periods: 2	Team: D	FTE %: 100	Courses: 0		Min Sections: 0	Max Sections: 0	Rooms: 0	>.
Staff, Cameron	Science (09/07/2010									
Max Periods: 4	Max Courses: 4	Max Con Periods: 2	Team: D	FTE %: 100	Courses: 0		Min Sections: 0	Max Sections: 0	Rooms: 0	>
Staff, Darlene	Social Studies (08/30/1	1994)								
Max Periods: 4	Max Courses: 4	Max Con Periods: 2	Team: D	FTE %: 100	Courses: 0		Min Sections: 0	Max Sections: 0	Rooms: 0	>
Staff, Elliot   Soc	cial Studies (08/03/201									
Max Periods: 4	Max Courses: 4	Max Con Periods: 2	Team: D	FTE %: 100	Courses: 0		Min Sections: 0	Max Sections: 0	Rooms: 0	>
Staff, Francine	Science (09/07/2010)									
Max Deriode: 4 Batch Edit Staff	Max Courses: A Batch Edit Constraints	Max Con Periode: 2 Print	Team: D	FTF %- 100	Courses: 0		Min Sections: ()	May Sections: ()	Poome: 0	Feedback 🗩
			Batch	Edit	Staff - Replace	Values				

### **Batch Edit Constraints**

Batch Edit Constraints modifies the Course Constraints, Room Constraints, and Placement Restrictions for the filtered staff by **adding** constraints where values did not previously exist (blank values); by **replacing** existing values with new values; or by **removing** existing values.

Use the **Collapse All/Expand All** button to view the Course Constraints, Room Constraints, and Placement Restriction cards at one time.

### **Add Constraints**

Adding constraints updates a course assignment, room assignment or placement restriction for the filtered list of staff to contain a value where a course, room or placement restriction was not previously assigned to staff or adds an additional course, room or placement restriction.

To add course constraints, room constraints and placement restrictions:

- 1. Click Batch Edit Constraints. The Batch Edit Staff Constraints Side Panel opens.
- 2. In the side panel (Expand All to open all cards):
  - For **Course Constraints**, click next to the course name to assign staff to courses, and modify the MIN and MAX values for each course marked. Follow the steps outlined in Assign Courses to the Teacher.
  - For **Room Constraints**, click next to the desired room numbers to add those rooms to the courses. Follow the steps outlined in Assign Rooms to Selected Teachers.



- For **Placement Restrictions**, click in any period row, term row, or period schedule row to add a placement restriction for the courses. Refer to the Placement Restrictions for guidance.
- 3. Click **Add.** The courses, rooms and placement restrictions are now assigned to the entire list of staff from the filtered options.

Repeat the same steps to add any missed courses, rooms or placements.

#### Example: Using Batch Edit Constraints to modify Course assignments

Click here to expand...

Staff shown in the image below here are not currently assigned to courses, to rooms or have any placement restrictions.

Staff Planner	\$					Scheduling & Course	s > Scheduling > S	Staff Planne
Filter V Show D							Scheduling Tools urse Planner Schedu	ling Board
Staff, Aaron 18	ocial Studies (09/07/2	010)						
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100 Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	>
Staff, Bailey	nglish (08/27/2007)   \$	Science (08/27/2013)						
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100 Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	>
Staff, Cameron	Science (09/07/201	0)						
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100 Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	>
Staff, Darlene	Social Studies (08/30)	/1994)						
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100 Courses: 0	Min Sections: 0	Max Sections: 0	Rooms: 0	>
_			_			_	_	_
			Staff F	Planner - No Current	Constraints			

Click **Batch Edit Constraints** and expand the **Course Constraints** card. Use the Filter field to locate course numbers starting with '270'. Place a green check next to courses 2700, 2701 and 2702. Then, the MIN and MAX fields can be modified to indicate the minimum and maximum number of sections each teacher can teach for each course. A value of 1 is entered for the MIN column, and values of 2, 4 and 1 are added to the MAX column.

Now, click **Add**. The list of 26 staff is now assigned to the three courses with the MIN and MAX section values.

Staff Planner	Details						More	s > Scheduling > Staff P Scheduling Tools Inse Planner Scheduling Bo	
Staff, Aaron 18	ocial Studies (09/07/20	010)							^
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D		Courses: 3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	Min Sections: 3 1 1 1	Max Sections: 7 2 4 1	Rooms: 0	>
Staff, Bailey	nglish (08/27/2007)   \$	Science (08/27/2013)							
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D		Courses: 3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	Min Sections: 3 1 1 1	Max Sections: 7 2 4 1	Rooms: 0	>
Staff, Cameron	Science (09/07/201	0)							
_		Course	s, Minimi	um Se	ctions, Maximum Se	ections Add	ed		

### **Replace Constraints**



Replacing constraints OVERWRITES previous selections of courses, rooms and placements and updates those selections to different courses, rooms and placements.

To replace course constraints, room constraints and placement restrictions:

- 1. Click Batch Edit Constraints. The Batch Edit Staff Constraints Side Panel opens.
- 2. In the side panel (Expand All to open all cards):
  - For Course Constraints, click next to the desired course names to assign staff to courses, and modify the MIN and MAX values for each course marked. These selections need to be different than what is already selected for the teachers.
  - For Room Constraints, click next to the desired room numbers to add those rooms to the courses. The selected rooms need to be different than what is already selected for the teachers.
  - For **Placement Restrictions**, click in any period row, term row, or period schedule row to add a placement restriction for the courses.
- 3. Click **Replace**. The courses, rooms and placement restrictions have been modified.

#### **Example: Using Batch Edit Constraints to Replace Room Assignments**

Click here to expand...

There are three rooms currently assigned to the Social Studies staff to teach their Human Geography and US History courses. However, those rooms need to be changed to other rooms due to the technology limitations in the current rooms. Rooms 0172, 0173, and 0174 need to replace rooms 0111, 0112, and 0113.

Staff Planner	\$						Scheduling & Course	s > Scheduling >	Staff Planner
Filter V Show I								Scheduling Tools Irse Planner Schedu	uling Board
Staff, Aaron 18	ocial Studies (09/07/2	:010)							^
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100	Courses: 3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	Min Sections: 3 1 1 1	Max Sections: 7 2 4 1	Rooms: 3 0111 (1) 0113 (2) 0112 (3)	>
Staff, Bailey   E	nglish (08/27/2007)	Science (08/27/2013)							
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100	Courses: 3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	Min Sections: 3 1 1 1	Max Sections: 7 2 4 1	Rooms: 3 0111 (1) 0113 (2) 0112 (3)	>
Staff, Cameron	Science (09/07/201	10)							
			Staff Pla	anner	- Current Rooms Ass	signed			

Click **Batch Edit Constraints** and expand the **Room Constraints** card. Use the Filter field to locate room numbers starting with 017'. Place a green check next to rooms 0172, 0173, and 0174.

Now, click **Replace**. The room numbers for the filtered list of staff have been changed from 0111, 0112 and 0113 to 0172, 0173 and 0174.

Staff Planner	습						Scheduling & Cours	es > Scheduling >	Staff Plar	nner
Filter V Show	Details							e Scheduling Tools urse Planner Sched	duling Board	1
Staff, Aaron	ocial Studies (09/07/2	010)								^
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100	Courses: 3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	Min Sections: 3 1 1 1	Max Sections: 7 2 4 1	Rooms: 3 0172 (1) 0173 (2) 0174 (3)		>
Staff, Bailey	nglish (08/27/2007)	Science (08/27/2013)								
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100	Courses: 3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	Min Sections: 3 1 1 1	Max Sections: 7 2 4 1	Rooms: 3 0172 (1) 0173 (2) 0174 (3)		>
Staff, Cameror	Science (09/07/201	0)								

### **Remove Constraints**

Removing course, room or placement restrictions values selected in the side panel from the filtered courses (i.e., the user selected the exact values that ought to be removed from existing records).

To remove those assignments and placement restrictions:

- 1. Click Batch Edit Constraints. The Batch Edit Staff Constraints Side Panel opens.
- 2. In the side panel (Expand All to open all cards):
  - For **Course Constraints**, select the SAME course name that are currently assigned to staff.
  - For **Room Constraints**, select the SAME room numbers that are currently assigned to assigned courses.
  - For **Placement Restrictions**, select the SAME period that is currently set for no placement.
- 3. Click **Remove**. The courses, rooms and placement restrictions are removed and set back to the default values.

#### Example: Using Batch Edit Constraints to Remove Placement Restrictions

Click here to expand...

The Social Studies Department has decide to change their meeting time for their monthly department meeting. Currently, the 26 Social Studies teachers all have Placement Restrictions during 00 Period. The new meeting has not yet been decided, so for now, that restriction needs to be removed.

The details of the restriction do not display on the main view of the Staff Planner, just an indication that there is a Placement Restriction.

Staff Planner	Scheduling & Course	es > Scheduling > Staff Planner						
Filter V ON	Details							
Staff, Aaron	Social Studies (09/07/2	2010)						PLACEMENT RESTRICTIONS
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100	Courses: 3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	Min Sections: 3 1 1 1	Max Sections: 7 2 4 1	Rooms: 3 0172 (1) 0173 (2) 0174 (3)
Staff, Bailey	English (08/27/2007)	Science (08/27/2013)						PLACEMENT RESTRICTIONS
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100	Courses: 3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	Min Sections: 3 1 1 1	Max Sections: 7 2 4 1	Rooms: 3 0172 (1) 0173 (2) 0174 (3)

Click Batch Edit Constraints and expand the Placement Restrictions card. Add the No Symbol

(  $\bigcirc$  ) to Period 00 for all four quarters.

- Pla	cement Res	trictions			
🗹 In	clude				
Filter by		pdate course		riod Schedule	. Select an entire row or column by clicking the header.
	Q1	Q2	Q3	Q4	]
00					
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			Plac	ement Re	striction for Period 00

#### Now, click **Remove.** The Placement Restrictions have been removed.

Staff Planner 🏠							Scheduling & Cou	urses > Scheduling > :	Staff Planner			
Filter V Show Details												
Staff, Aaron   Social Studies (0	9/07/2010)							PLACEMENT REST	NCTIONS			
Max Periods: 4 Max Courses	4 Max Con Period:	s: 3 Team: D	2	ourses: 3 700 Human Geography I 701 Human Geography II 702 U.S. History I		Min Sections: 3 1 1 1	Max Sections: 7 2 4 1	Rooms: 3 0172 (1) 0173 (2) 0174 (3)	,			
Staff, Bailey   English (08/27/2	007)   Science (08/27/20	013)						PLACEMENT REST	RETIONS			
Max Periods: 4 Max Courses	4 Max Con Period	s: 3 Team: D	FTE %: 100 C	ourses: 3 700 Human Geography I		Min Sections: 3 1	Max Sections: 7 2	Rooms: 3 0172 (1)				
	Staff Planner ☆								Scheduling & Courses	> Scheduling >	Staff Planner	
	Filter V Show De											
	Staff, Aaron   So	Staff, Aaron   Social Studies (09/07/2010)										
	Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100	Courses: 3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I		Min Sections: 3 1 1 1	Max Sections: 7 2 4 1	Rooms: 3 0172 (1) 0173 (2) 0174 (3)	>	
	Staff, Bailey   English (08/27/2007)   Science (08/27/2013)											
	Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100	Courses: 3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I		Min Sections: 3 1 1 1	Max Sections: 7 2 4 1	Rooms: 3 0172 (1) 0173 (2) 0174 (3)	>	
	Staff Cameron	Science (09/07/20	0)								_	
			Place	ment Re	strict	tions Remove	ed					



# **Next Steps**

- Review the Scheduling Center and/or Checklist for Scheduling for remaining scheduling tasks.
- Use the Scheduling Board to build the courses and load the student requests.
- Use the Course Planner to compare student request and course sections to ensure the correct number of course sections is available for scheduling.
- Generate scheduling reports to review the placement of courses.
- When all scheduling items have been completed, mark the Scheduling Board Trial active.

### **Previous Versions**

Staff Planner [.2323 - .2327] Staff Planner [.2303 - .2319]