

Staff Planner

Last Modified on 10/21/2024 8:20 am CDT

[When to use the Staff Planner](#) | [Navigation of Staff Planner](#) | [Staff Planner Logic](#) | [Staff Planner Layout](#) | [Modify Staff Planner Information Using Batch Functionality](#) | [Next Steps](#) | [Staff Planner Tool Rights](#)

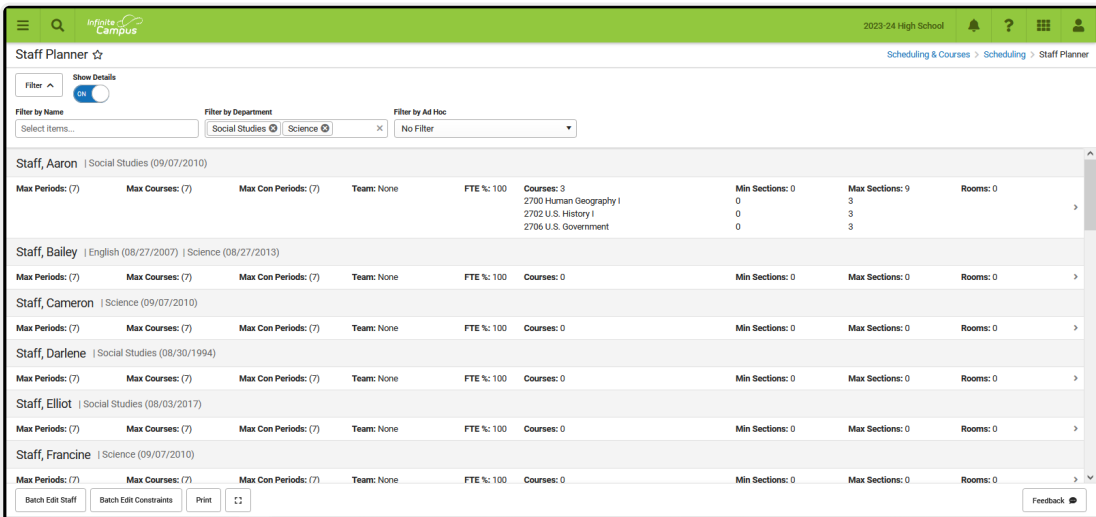
Tool Search: Staff Planner

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.



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.

Read - Access and view the Staff Planner cards and course information.

Write - Edit and save changes to the Staff Planner side panel, use Batch Edit tools and use the Filter fields.

Add - N/A

Delete - N/A

See the [Tool Rights](#) section below for more details on what actions can be performed with each right.

When to use the Staff Planner

- 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

[Locked Trial](#) | [Filter Options](#) | [Show Details](#) | [More Scheduling Tools](#) | [Action Bar Options](#)

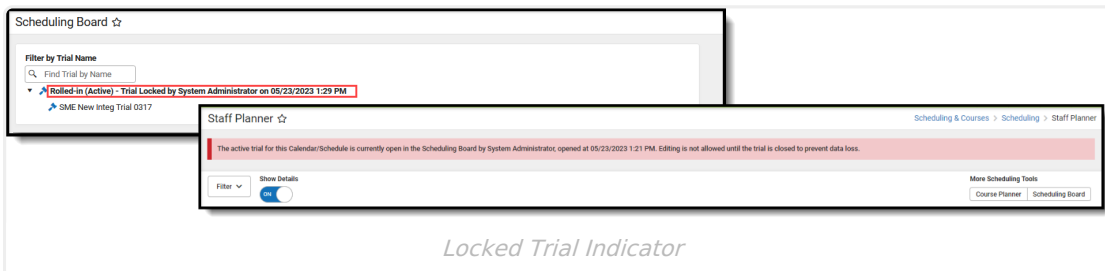
A **Year**, **School** and **Calendar** (and **Structure** when applicable) **MUST** be selected in the Campus toolbar in order to display information.

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

Locked Trial

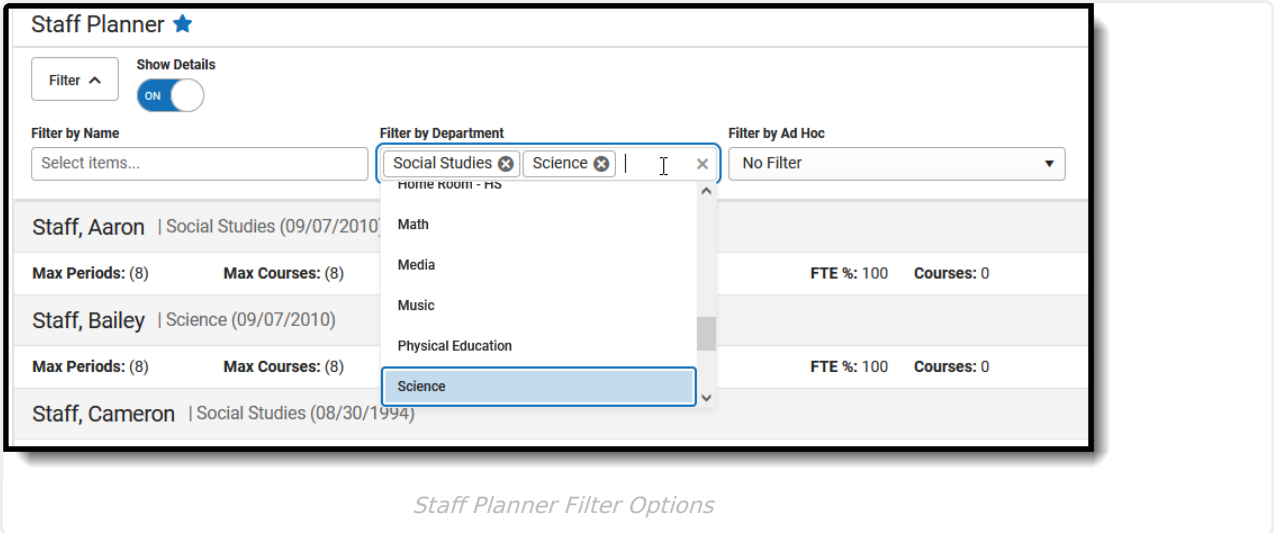
When viewing the Staff Planner for a Scheduling Trial that is currently locked (e.g., someone is working on that trial in the Scheduling Board), a banner displays at the top of the Staff Planner indicating such. This banner displays only when navigating to the Staff Planner from the outline (not using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

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



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.



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 Department.** 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.

Staff Planner ☆

Filter ^ Show Details ON

Filter by Name: Select items... Filter by Department: English Filter by Ad Hoc: No Filter

Staff, Aaron L | English (08/27/2007) | Science (08/27/2013)

Max Periods: (S) Min Secti

District Assignments ☆

Staff, Aaron L DOB: 04/12/1981

New Documents

Assignments

- High School
 - Science - (08/27/2013-)
 - English - (08/27/2007-)

Staff Assigned Multiple Departments at one school

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 ☆

Filter ^ Show Details ON

Filter by Name: Select items... Filter by Department: Select items... Filter by Ad Hoc: No Filter

Staff, Kevin | (08/18/2016)

Max Periods: Max Courses: Max Con Periods: Team: None FTE %: 100 Courses: 3
0118 Approaches to Learning 9 I
0120 Approaches to Learning 10 I
0150 Executive Skills Strategies I

Staff, Lin | Special Education (08/22/2018)

Max Periods: Max Courses: Max Con Periods: Team: None FTE %: 100 Courses: 0

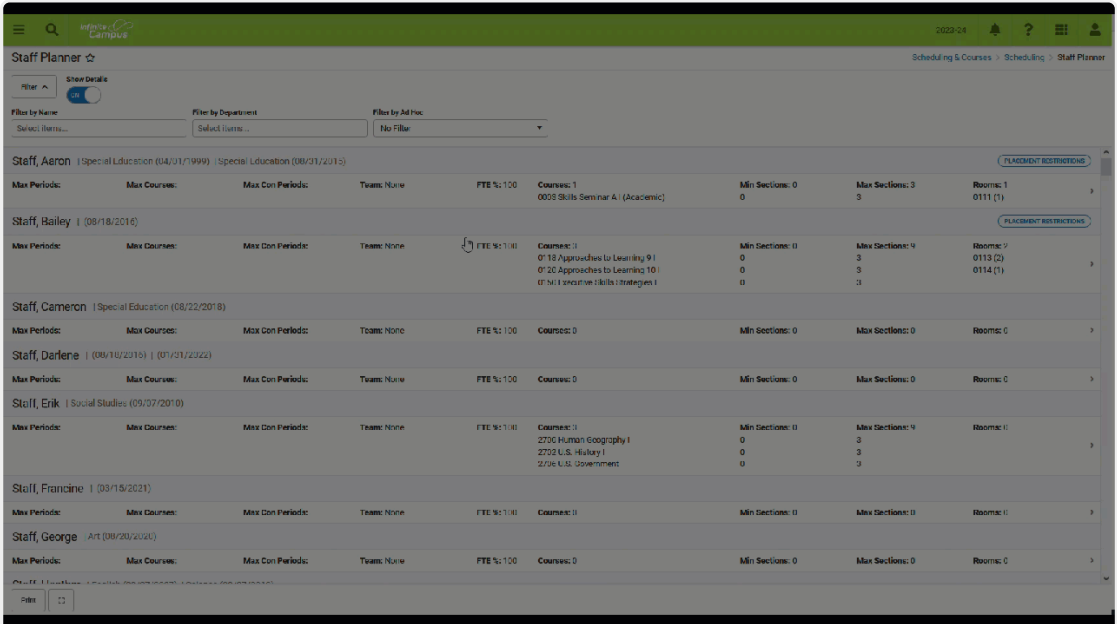
Staff, Manuel | (08/18/2016) | (01/31/2022)

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

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.

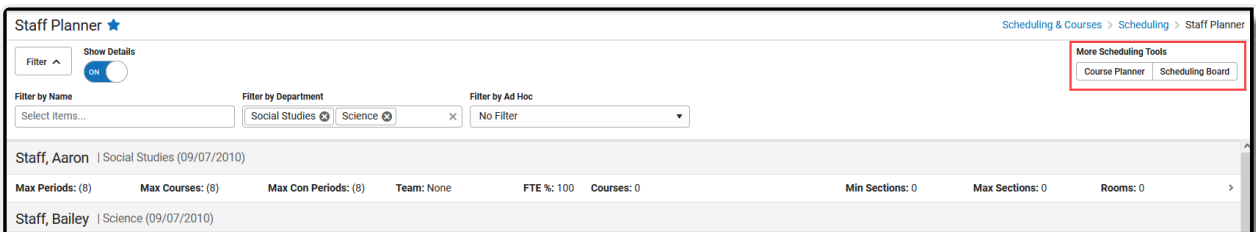


Staff Planner Display Options

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.



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

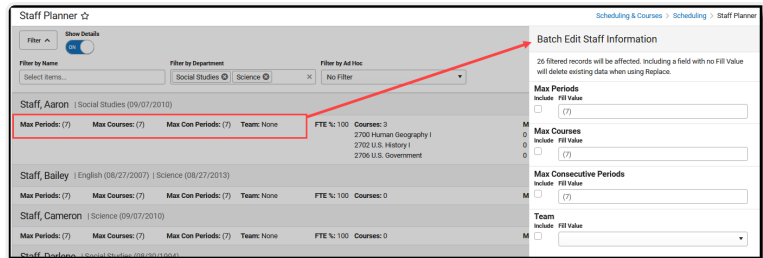
information and to view the Staff Planner in full screen mode.

Staff, Cameron Science (09/07/2010)				
Max Periods: (7)	Max Courses: (7)	Max Con Periods: (7)	Team: None	FTE %: 100
Staff, Darlene Social Studies (08/30/1994)				
Max Periods: (7)	Max Courses: (7)	Max Con Periods: (7)	Team: None	FTE %: 100
Staff, Elliot Social 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	Batch Edit Constraints	Print		

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.

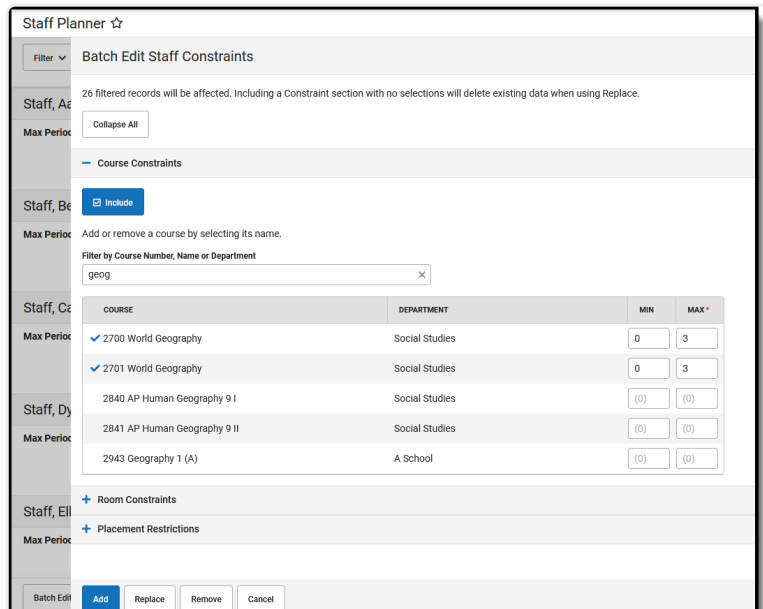


Batch Edit Staff Information

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

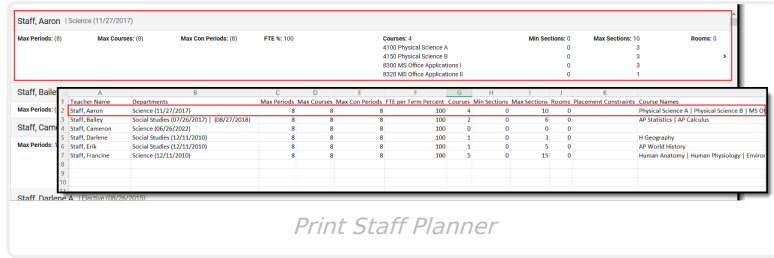
After filtering the list of staff to an entire department or a single staff person, for example, set constraints to set the minimum and maximum section numbers for courses, or set the room for a particular staff person to always teach in room 100, or to not have any Social Science teachers teach a section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

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

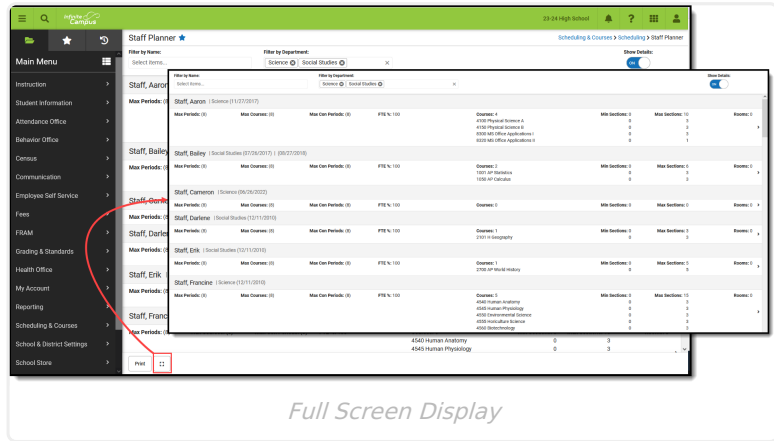


Batch Edit Constraints for Staff

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.

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

[Main View](#) | [Staff Planner Side Panel](#) | [Previous and Next Staff](#)

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.

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	<p>Maximum number of consecutive instructional periods the teacher can teach during the day.</p> <p>This reflects a negotiated or preferred number of courses a teacher is allowed to teach in a row without a prep period/other break.</p>	Maximum Consecutive Periods Taught per Day
Team	<p>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.</p> <p>When there are NO Teams/Scheduling Groups created for the school, this column does not display.</p>	N/A

Fields	Description	Builder Configuration Field
<p>FTE</p>	<p>Full-Time Equivalent. This value is automatically calculated from the Max Periods field divided by the Max Courses field.</p> <p>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%.</p> <p>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 sometime during the day. Each period and each course taught calculates the FTE value of the staff person.</p> <p>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.</p> <p>When a course section spans multiple periods, each period associated with that section is included in this value.</p> <p>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.</p> <div data-bbox="437 1677 995 1883" style="background-color: #fff9c4; padding: 10px; border: 1px solid #ccc;"> <p>The FTE fields on the District Assignment and the District Employment records ARE NOT THE SAME AS and DO NOT affect this field.</p> </div>	<p>Max Periods divided by the default value of Periods Taught for 100% (whatever shows in parentheses)</p>
<p>Courses</p>	<p>Number of courses that are currently assigned to the teacher.</p>	<p>N/A</p>

Fields	Description	Builder Configuration Field
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.

The screenshot shows the Staff Planner interface. A side panel is open for 'Staff, Aaron | Social Studies'. The side panel has a 'Collapse All' button and a 'Courses & Rooms' section. The 'Courses & Rooms' section has a search filter 'geog' and a table with the following data:

COURSE	DEPARTMENT	MIN	MAX
✓ 2700 World Geography	Social Studies	1	2
✓ 2701 World Geography	Social Studies	1	4
✓ 2702 U.S. History	Social Studies	1	1
2840 AP Human Geography 9 I	Social Studies	(0)	(0)
2841 AP Human Geography 9 II	Social Studies	(0)	(0)
2943 Geography 1 (A)	A School	(0)	(0)

Below the table is a 'Filter by Room or Room Type' section with a search filter and a table with the following data:

ROOM	PRIORITY
✓ 0172	1
✓ 0173	2
✓ 0174	3
0110 (period01)	
Test (period1)	
0111	

The caption below the screenshot is 'Staff Planner Side Panel'.

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, Darlene | Special Education

Max Periods: 5 Max Courses: 7 Max Consecutive Periods: 6 Team: D

+ Courses & Rooms **-** Placement Restrictions

Click on a box to restrict staff placement. Select an entire row or column by clicking the header.

Filter by Term: Filter by Period Schedule:

	Q1	Q2	Q3	Q4
00	1	1	1	1
01				

Expand or Collapse Staff Planner Cards

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, in 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.

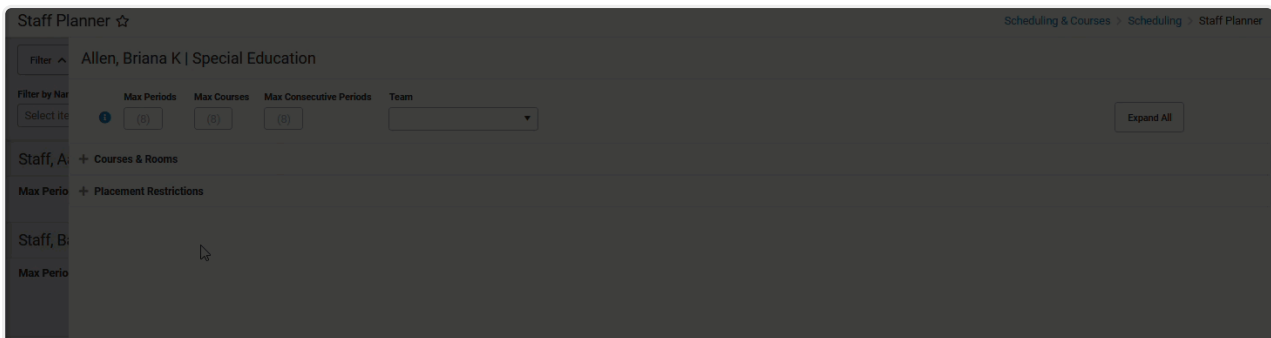
Change Max Periods, Max Courses, Max Consecutive Periods Values

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 Special Education (08/31/2015)	Adjusted value in Staff Planner				
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)					
Max Periods: 7	Max Courses: 7	Max Con Periods: 7	Team: None	FTE %: 100	Courses: 3 0118 Approaches to Learning 9 I Approaches to Learning 10 I Executive Skills Strategies I
Staff, Cameron Special Education (08/22/2018)					
Max Periods: (8)	Max Courses: (8)	Max Con Periods: (8)	Team: None	FTE %: 100	Courses: 0
Staff, Darlene (08/18/2016) (01/31/2022)					
Max Periods: (8)	Max Courses: (8)	Max Con Periods: (8)	Team: None	FTE %: 100	Courses: 0

Staff Planner Adjusted Values vs. Default Values

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.
3. 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.



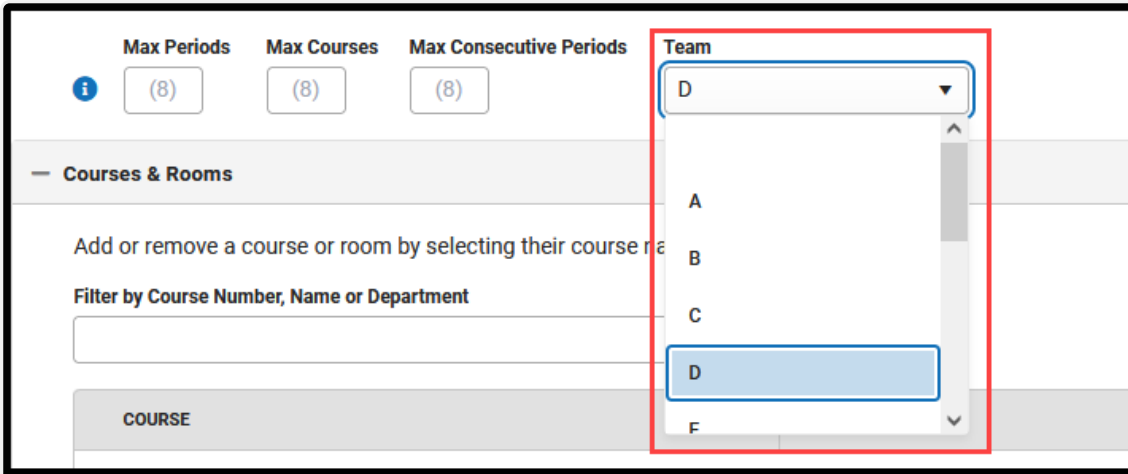
Adjusting Max Periods, Courses, Consecutive Periods Values

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.



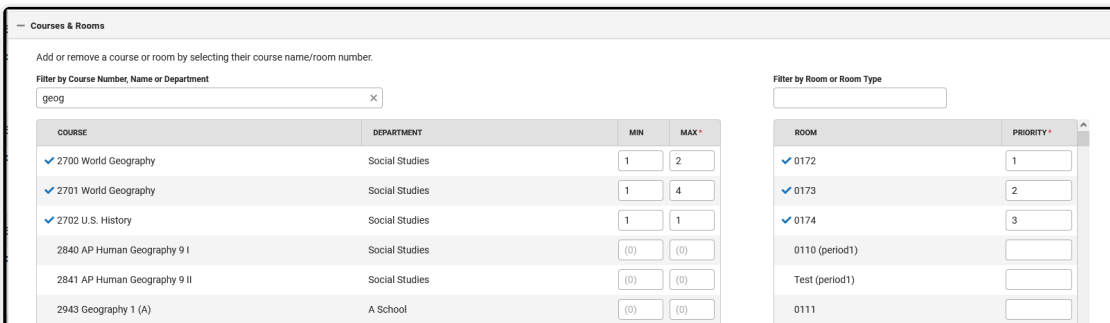
Staff Planner Team Selection

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.



Staff Planner - Course and Rooms

- 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.

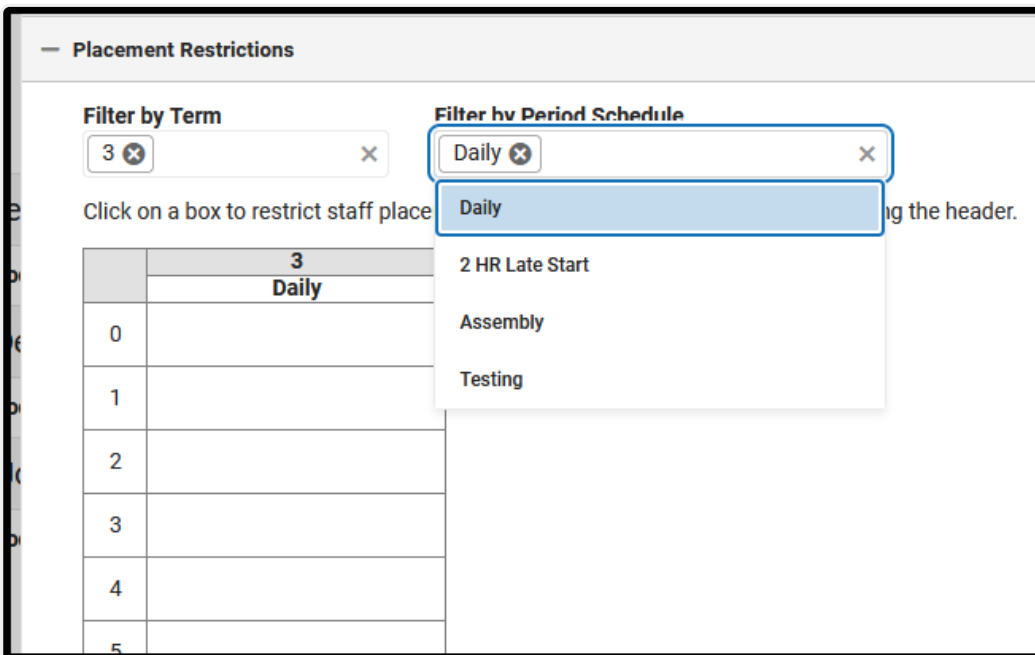
Assign Rooms to Selected Teachers

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.



Placement Restriction Filtered Display

When a restriction is added, the No Symbol () 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).

Placement Restrictions

Click on a box to restrict staff placement. Select an entire row or column by clicking the header.

Filter by Term: Filter by Period 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
0																
1																
3																
4																
5																
6																
7																
8																
ACT																

1. Period Restriction

Placement Restrictions

Click on a box to restrict staff placement. Select an entire row or column by clicking the header.

Filter by Term: Filter by Period 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
0																
1																
2																
3																
4																
5																
6																
7																
8																
ACT																

2. Late Start Schedule Restriction

Placement Restrictions

Click on a box to restrict staff placement. Select an entire row or column by clicking the header.

Filter by Term Filter by Period 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
0									⊘							
1									⊘	⊘	⊘	⊘				
2									⊘	⊘	⊘	⊘				
3									⊘	⊘	⊘	⊘				
4									⊘	⊘	⊘	⊘				
5									⊘	⊘	⊘	⊘				
6									⊘	⊘	⊘	⊘				
7									⊘	⊘	⊘	⊘				
8										⊘						
ACT									⊘							

3. Term Restriction

Placement Restrictions

Click on a box to restrict staff placement. Select an entire row or column by clicking the header.

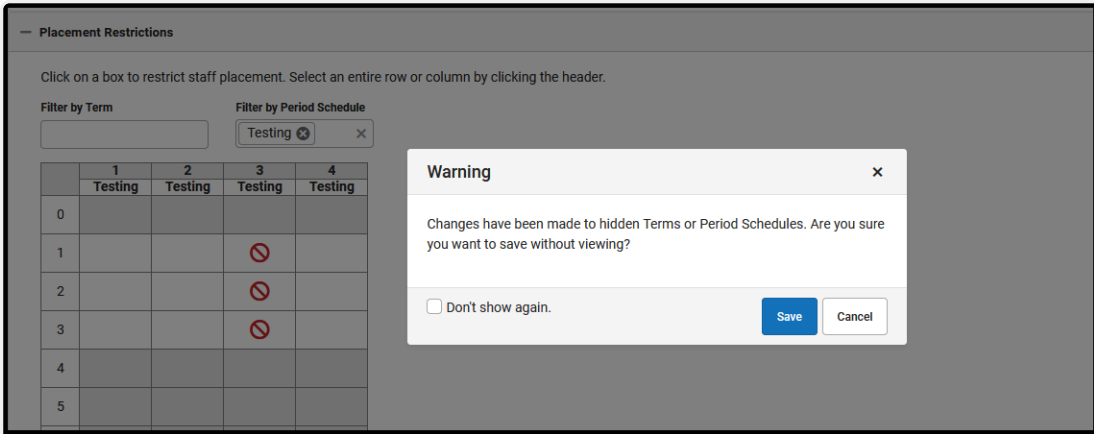
Filter by Term Filter by Period Schedule

	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
0																
1																
2																
3																
4																
5																
6																
7																
8																
ACT																

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.



Restriction assigned to Hidden Terms/Schedules

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.

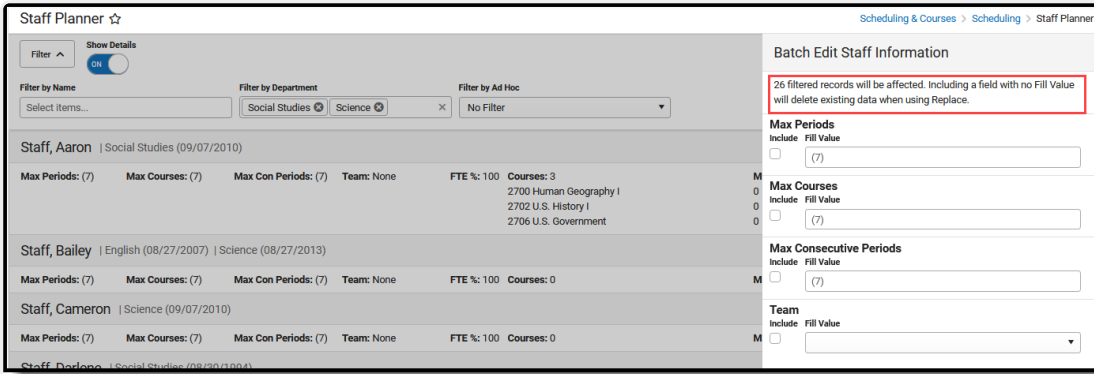


Previous and Next Buttons

Modify Staff Planner Information Using Batch Functionality

[Batch Edit Staff](#) | [Batch Edit Constraints](#)

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.



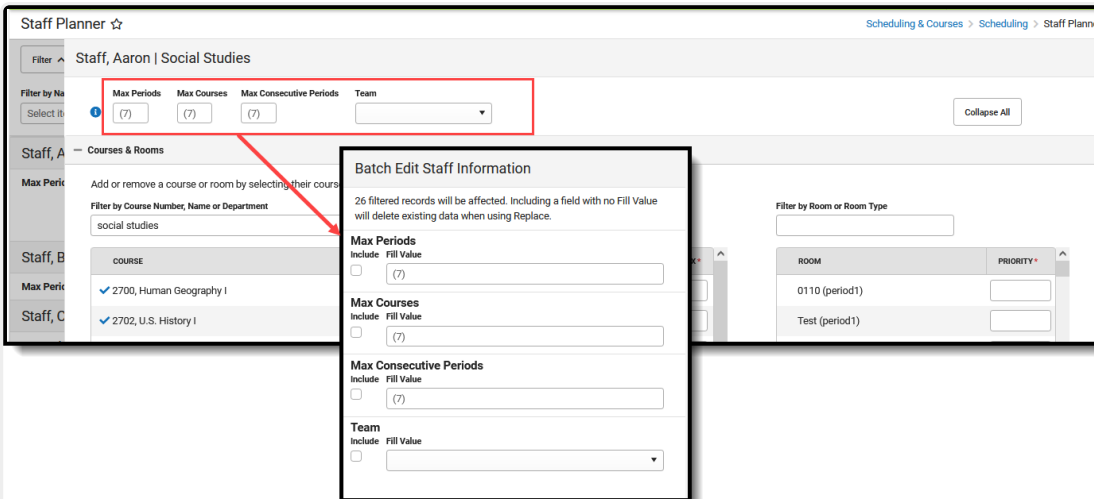
Batch Edit Staff - Filtered Records

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.



Available Fields for Batch Edit Staff

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.

1. 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.

The screenshot shows the Staff Planner interface with the following data for the staff members listed:

Staff Name	Department	Max Periods	Max Courses	Max Con Periods	Team	FTE %	Courses	Min Sections	Max Sections	Rooms
Staff, Aaron	Social Studies (09/07/2010)	(7)	(7)	(7)	None	100	3 2709 Human Geography I 2701 U.S. History I 2702 Human Geography I	0	9	0
Staff, Bailey	English (08/27/2007) Science (08/27/2013)	(7)	(7)	(7)	None	100	0	0	0	0
Staff, Cameron	Science (09/07/2010)	(7)	(7)	(7)	None	100	0	0	0	0
Staff, Darlene	Social Studies (08/30/1994)	(7)	(7)	(7)	None	100	0	0	0	0
Staff, Elliot	Social Studies (08/03/2017)	(7)	(7)	(7)	None	100	0	0	0	0
Staff, Francine	Science (09/07/2010)	(7)	(7)	(7)	None	100	0	0	0	0

Below the table, there are buttons for 'Batch Edit Staff', 'Batch Edit Constraints', 'Print', and 'Feedback'.

Batch Edit Staff - Add Values

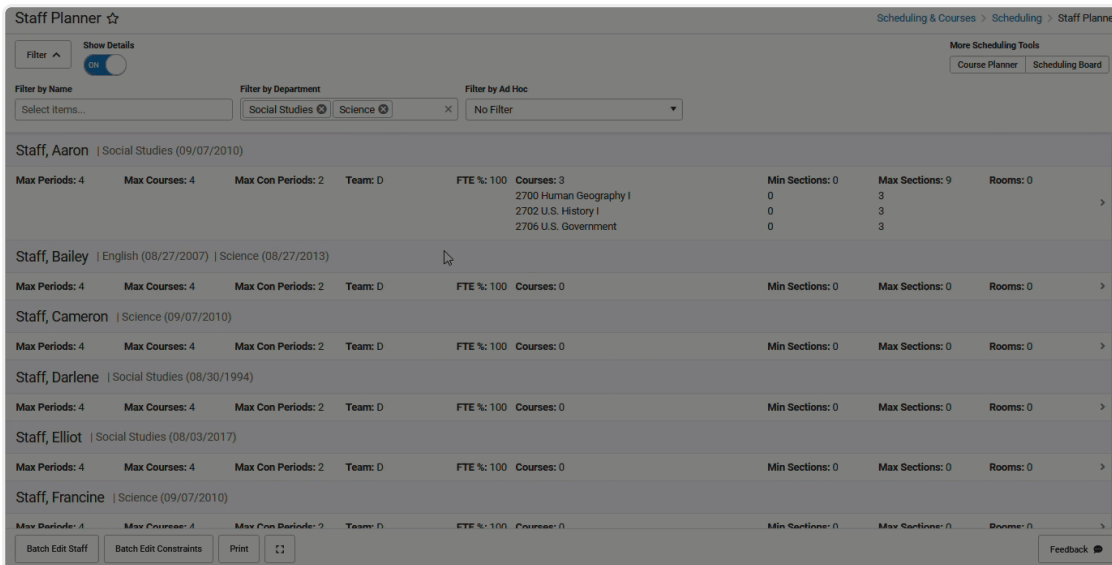
Replace Staff Information

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).

1. 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.



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	Max Periods	Max Courses	Max Con Periods	Team	FTE %	Courses	Min Sections	Max Sections	Rooms
Staff, Aaron Social Studies (09/07/2010)	4	4	3	D	100	0	0	0	0
Staff, Bailey English (08/27/2007) Science (08/27/2013)	4	4	3	D	100	0	0	0	0
Staff, Cameron Science (09/07/2010)	4	4	3	D	100	0	0	0	0
Staff, Darlene Social Studies (08/30/1994)	4	4	3	D	100	0	0	0	0

Staff 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	Max Periods	Max Courses	Max Con Periods	Team	FTE %	Courses	Min Sections	Max Sections	Rooms
Staff, Aaron Social Studies (09/07/2010)	4	4	3	D	100	3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	3 1 1 1	7 2 4 1	0
Staff, Bailey English (08/27/2007) Science (08/27/2013)	4	4	3	D	100	3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	3 1 1 1	7 2 4 1	0
Staff, Cameron Science (09/07/2010)	4	4	3	D	100	3 2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	3 1 1 1	7 2 4 1	0

Courses, Minimum Sections, Maximum Sections Added

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	Max Periods	Max Courses	Max Con Periods	Team	FTE %	Courses	Min Sections	Max Sections	Rooms
Staff, Aaron Social Studies (09/07/2010)	4	4	3	D	100	2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	1 1 1	2 4 1	0111 (1) 0113 (2) 0112 (3)
Staff, Bailey English (08/27/2007) Science (08/27/2013)	4	4	3	D	100	2700 Human Geography I 2701 Human Geography II 2702 U.S. History I	1 1 1	2 4 1	0111 (1) 0113 (2) 0112 (3)
Staff, Cameron Science (09/07/2010)									

Staff Planner - Current Rooms Assigned

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									
Staff, Aaron Social Studies (09/07/2010)					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	Min Sections: 3	Max Sections: 7	Rooms: 3	
					2700 Human Geography I	1	2	0172 (1)	
					2701 Human Geography II	1	4	0173 (2)	
					2702 U.S. History I	1	1	0174 (3)	
Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100	Courses: 3	Min Sections: 3	Max Sections: 7	Rooms: 3	
					2700 Human Geography I	1	2	0172 (1)	
					2701 Human Geography II	1	4	0173 (2)	
					2702 U.S. History I	1	1	0174 (3)	
Staff, Cameron Science (09/07/2010)									

Staff Planner - Rooms Replaced

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):
 - o For **Course Constraints**, select the SAME course name that are currently assigned to staff.
 - o For **Room Constraints**, select the SAME room numbers that are currently assigned to assigned courses.
 - o 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 & Courses > Scheduling > Staff Planner

Filter ON

Staff, Aaron | Social Studies (09/07/2010) PLACEMENT RESTRICTIONS

Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100	Courses: 3	Min Sections: 3	Max Sections: 7	Rooms: 3
					2700 Human Geography I	1	2	0172 (1)
					2701 Human Geography II	1	4	0173 (2)
					2702 U.S. History I	1	1	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	Min Sections: 3	Max Sections: 7	Rooms: 3
					2700 Human Geography I	1	2	0172 (1)
					2701 Human Geography II	1	4	0173 (2)
					2702 U.S. History I	1	1	0174 (3)

Current Placement Restriction for Social Studies





Click **Batch Edit Constraints** and expand the **Placement Restrictions** card. Add the No Symbol () to Period 00 for all four quarters.

Placement Restrictions

Include

Click on a box to update course placement restrictions. Select an entire row or column by clicking the header.

Filter by Term Filter by Period Schedule

	Q1	Q2	Q3	Q4
	1	1	1	1
00				
01				
02				

Placement Restriction for Period 00

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

Staff Planner ☆ Scheduling & Courses > Scheduling > Staff Planner

Filter ON

Staff, Aaron | Social Studies (09/07/2010) PLACEMENT RESTRICTIONS

Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100	Courses: 3	Min Sections: 3	Max Sections: 7	Rooms: 3
					2700 Human Geography I	1	2	0172 (1)
					2701 Human Geography II	1	4	0173 (2)
					2702 U.S. History I	1	1	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	Min Sections: 3	Max Sections: 7	Rooms: 3
					2700 Human Geography I	1	2	0172 (1)
					2701 Human Geography II	1	4	0173 (2)
					2702 U.S. History I	1	1	0174 (3)

Staff, Cameron | Science (09/07/2010)

Max Periods: 4	Max Courses: 4	Max Con Periods: 3	Team: D	FTE %: 100	Courses: 3	Min Sections: 3	Max Sections: 7	Rooms: 3
					2700 Human Geography I	1	2	0172 (1)
					2701 Human Geography II	1	4	0173 (2)
					2702 U.S. History I	1	1	0174 (3)

Placement Restrictions Removed

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.

Staff Planner Tool Rights

For more information about Tool Rights and how they function, see the [Tool Rights](#) article.

Access to the Staff Planner requires the following:

Read Rights:

- Access Staff Planner.
- View Staff Planner cards, including detail information (list of courses, etc.).
- Open and view the Staff Planner Side Panel.
- Print a CSV download of the courses assigned to staff.

Write Rights:

- Use the Filter By fields at the top of the Staff Planner.
- Edit and save changes to the Staff Planner Side Panel.
- Use the Batch Edit and Batch Edit Constraints options.

Add and Delete rights provide no additional functionality.

Users who were assigned ANY tool rights to the [Scheduling Board](#), full tool rights (RW) have been assigned to Staff Planner.

Users who were NOT assigned tool rights to [Scheduling Board](#) have not been assigned any tool rights to Staff Planner.

Previous Versions

[Staff Planner \[.2323 - .2327\]](#)

[Staff Planner \[.2303 - .2319\]](#)

