



Scheduling Board

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What's New in Scheduling Board

As part of an ongoing project to enhance scheduling tools throughout the product, the new Scheduling Board (replaces the [Schedule Wizard](#)) was released in the [Campus.2315 Release Pack](#) (April 2023).

This is the first release of the new Scheduling Board; see the Release Notes and the [What's New in Scheduling?](#) article for details on future releases.

Submit feedback for the Scheduling Board by clicking the **Feedback** button in the bottom right hand corner. This takes you to the [Campus Community Scheduling Board](#) forum topic where you can add your suggestions for the Scheduling Board and Scheduling Board Trials.

[Scheduling Board Navigation](#) | [Create the Schedule](#) | [Choose Settings for the Scheduling Board](#) | [Build](#) | [Load All Courses](#) | [Lock Rosters](#) | [Build, Move and Delete Course Sections using Drag and Drop](#) | [Print](#) | [Next Steps](#)

Tool Search: Scheduling Board

The Scheduling Board provides a visual representation of a school's overall schedule, much like a spread sheet or a magnetic white board to visualize and build the school's schedule. This visualization has been digitized in the Scheduling Board.

Users can easily see the schedule being built in real time, along with any teacher and room conflicts. Course sections can be dragged and dropped onto the schedule grid, and moved around to other terms and periods, or removed completely. Quickly load and unload course sections, build and unbuild all the courses, lock and unlock section rosters, all within one tool.

See the [Scheduling Board landing page](#) for the following:

- A [Scheduling Timeline](#) to stay on track for the entire scheduling season.
- Necessary [tool rights](#) for using the Scheduling Board.
- A [comparison](#) of what was done where in the Schedule Wizard and where that same task is done in the Scheduling Board.

Scheduling Board

This article provides information on how to use the Scheduling Board to place courses and



course sections, how to assign teachers and rooms to course sections, how to load student course requests and provide guidance in creating the primary schedule for the next school year.

It does not cover every possible schedule design or calendar structure, nor does it attempt provide answers to optimizing student productivity.

Scheduling Board Navigation

[Settings](#) | [Actions](#) | [Other Side Panels](#) | [Hover Boxes](#)

The Scheduling Board replaces the [Schedule Wizard](#), which is still available and can be used interchangeably with this new Scheduling Board.

At the top of the Scheduling Board are **Settings**, where changes to the schedule grid can be done, updates to highlight options (conflicts, missing data, etc.) are managed, and access to other scheduling tools are available. Settings determine how courses display in the grid.

Scheduling Board Settings

Across the bottom of the Scheduling Board are **Actions** that can be done. Build and unbuild courses, load and unload courses, lock and unlock rosters, and save changes made or cancel any changes that have been made. Actions determine what happens to the courses on the grid.


Screenshot of the available Scheduling Board actions.

Scheduling Board Actions

Settings

Option	Description
Set Placement Type	Lists either the Course Number by department or the Staff Name by department on the left hand side. <input type="text"/> <input type="text"/>
Set Period Axis	Determines where the Periods display - across the top with Terms and Schedule Structure (X-axis), or down the side with the Course Names and Staff Names (Y-axis). <input type="text"/> <input type="text"/>



Option	Description
Collapse All, Expand All	Collapses or expands all departments. This makes it easier to work with just one or two departments at a time.
Settings	Opens a side panel to set what displays as highlighted (conflicts, missing data, etc.); what displays on a course section (teacher name, room, team, etc.); what can be toggled on or off to show locked rosters and locked course builds; and what can be set to be show or hide (terms/period schedules, departments, singletons, etc.). See the Settings Side Panel section below for details. 
Restore	Resets all settings to the original options.
Trial Name	Lists which trial is displayed. To choose a new trial, click Cancel or Save & Close in the Action Bar. This closes the Scheduling Board and returns the user to the Scheduling Board Trials to choose another trial or create a new trial.
More Scheduling Tools	Lists additional tools that may help with the scheduling of courses for the next year, like Staff Planner and Course Planner.
Hide/Display Setup Options	Hides or displays all Scheduling Board Settings. Changes made to courses that may be in a term or schedule or period that is marked as hidden are still made, even when they aren't displayed on the grid.

Settings Side Panel

The Settings Side Panel determines what information is called out, highlighted or hidden in the grid. These items may need additional work done on them. For example, a course is displaying in red indicating there is a student to student conflict after loading student requests; or there are some empty sections that could alleviate the extra students in some of the overloaded sections.

Screenshot of the Settings Side Panel.

Settings Side Panel

▶ [Click here to expand...](#)

Actions

Option	Description
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Option	Description
Save	<p>Saves any changes made to the placement and loading/building of courses since the last save. Two options are available:</p> <ul style="list-style-type: none">• Save & Stay - saves any changes to the selected trial and the board remains open for additional updates.• Save & Close - saves any changes to the selected trial and the board closes. <p>In order to avoid a trial being locked after you have exited the Scheduling Board and to avoid losing any changes that were made to the course grid, use one of these options.</p> <input data-bbox="331 591 1136 622" type="text"/> <p>The Scheduling Board saves in the background after choosing Save & Close. The trial remains locked until the save is complete. The page will need to be refreshed to see that the trial is fully saved and no longer locked.</p>
Cancel	<p>Closes the selected trial. When changes have been made but NOT saved, an Unsaved Changes message displays asking whether those changes should be saved. Choose Stay to remain on the board and continue working, or choose Leave to close the board without saving the changes.</p>
Build	<p>Places course and section information on the board. It uses information from the Course Planner and Staff Planner, and from any existing course information data that has been rolled over from the previous calendar.</p> <ul style="list-style-type: none">• Run Full Build - builds every active course across all terms and departments. This may take some time, depending on the amount of courses and sections to place.• Run Full Unbuild - removes any course section from the board that is not already locked. When there are no courses locked, the grid is completely blank when finished.• Settings - determines how courses and sections are built. This was previously called the Builder Configuration tool. See the Build Settings section below for more information. <p>A build does NOT add student requests. A build places the course sections on the grid in a period that best fits the requirements of the course and the Builder Configuration settings.</p> <input data-bbox="331 1536 1136 1568" type="text"/>



Option	Description
Load	<p>Places student requests into the sections placed on the grid.</p> <ul style="list-style-type: none">• Run Full Load - adds all entered student requests into a course section that best meets the needs of the student.• Run Full Unload - removes all entered course requests from the course sections that are not locked.• Settings - determines how the requests are loaded. This was previously called the AutoLoader Configuration tool. See the Load Settings section below for more information.• Section Balance - determines how course sections are loaded based on factors/weights, like gender, discipline, special education, etc. See the Section Balance Configuration section below for more information. <input data-bbox="333 696 1137 730" type="text"/>
Lock Rosters	<p>Locks or unlocks rosters for every course section placed on the grid for the students in the selected Grade Levels (selected in the Lock/Unlock All Rosters by Grade Side Panel). Only course sections with placed requests/students are locked/unlocked.</p> <p>This means sections without any students assigned to them are not locked/unlocked, allowing those sections to be manually loaded and manually locked/unlocked.</p> <input data-bbox="333 1028 1137 1061" type="text"/>



Option	Description
Stats	<p>Displays a Trial Statistics Side Panel that shows counts and percentages for Requests Satisfied, All Requests Satisfied for Student and Complete Schedules.</p> <ul style="list-style-type: none"> • Requests Satisfied shows the number of requests satisfied over the total requests for all students, and the percentage of those two values. When a student is hand-scheduled into a course (therefore, there are no requests for those courses), or when the student has an alternate course request, the first number of the Requests percentage increases. • All Requests Satisfied for Student shows the total students who have all of their requests satisfied over the number of total students, and the percentage of those two values. When a student does not have any course requests, that is included in the All Requests Satisfied percentage. • Complete Schedules shows the total number of students who have at least the maximum number of Scheduling Units possible for the trial over the total number of students. This does not necessarily mean a student has a complete schedule; there may be instances where the student has met the number of Scheduling Units but there is still an empty period on their schedule. The total number of Scheduling Units is found by multiplying the total number of Terms by the total number of Schedules by the total number of Periods, just like the Walk-In Scheduler. <p>Alternate requests are NOT included in these values.</p> <p>These same values also display on the Scheduling Board Trials side panel.</p> <p>Screenshot of the Stats side panel.</p>
Print	<p>Displays the Scheduling Board in a printable view, in either PDF or XLSX format.</p> <p>Screenshot of the available Print options in Scheduling Board</p>
Full Screen	<p>Displays the Scheduling Board in a full screen view, removing borders and navigation tips. This increases the working space. Click the ESC key to return to the previous view.</p> <p>This first image shows the standard view of the Scheduling Board.</p> <p>Screenshot of the regular display of the Scheduling Board</p> <p>This second image shows the full screen view of the Scheduling Board.</p> <p>Screenshot of the Full Screen view of the Scheduling Board</p>

Build Settings Side Panel

The following table defines the available **Build Configuration** options.

Screenshot of the Build Setting Side Panel

Build Settings Configuration



[▶ Click here to expand...](#)

Load Settings Side Panel

The following table defines the available **Load Configuration** options.

Screenshot of the Load Settings Side Panel

[▶ Click here to expand...](#)

Section Balance Configuration Side Panel

Users can define weights on five factors that determines how hard the algorithm needs to work to achieve balance between sections of a course. The degree to which the Scheduling Board seeks balance in each area is governed by a percentage slider from 0 (does not factor) to 100 (factors the most). In addition to the slider, a text box to the right of the slider allows for a total percentage entry - 50 for 50%, 75 for 75%, etc.

Screenshot of the Load Section Balance Side Panel

Section Balance Configuration

The following table defines the Section Balance logic.

[▶ Click here to expand...](#)

Other Side Panels

For each Term, Period, Course and Section, additional settings can be selected in the side panel. To open these side panels, right-click on the term/period/course/section. The options are the same for each item.

[▶ Click here to expand...](#)

Hover Boxes

There are several places in the Scheduling Board where hovering over (placing the cursor over an entry on the board and leaving it there to display an information box) a section, a course or other area displays a window where key information may be found to aid the scheduler in placing sections, detecting issues and determining how successful the current trial meets the needs of students.

For each hover option, text for what to do next displays, like right-clicking to display the side panels for Courses, Sections, etc., and for dragging and dropping courses onto the grid or moving sections on the grid.

Screenshot of the information available in the hover box for additional guidance.

Hover Box Guidance



▶ [Click here to expand...](#)

Create the Schedule

The Calendar has been created, students have entered course requests, and it's about 10 weeks to the end of the school year. It's time to start creating your course schedule.

A few tips as you get started:

- Refer to the [Checklist of Scheduling](#) and the [Scheduling Center](#) to stay on top of all tasks that need to be done for a successful scheduling season.
- Schedule subsets of students first.
 - It's easiest to build the schedule for smaller sets of students, like Special Education students or those with a less than full time FTE at the school.
 - When scheduling for the high school, start with the Seniors, as they have a limited time to meet their graduation requirements. Then work backwards through the grade levels (11, 10, etc.).
 - Load singleton courses first. Students who request those courses have one chance to be scheduled into them.
- At least one trial is always active for a calendar. That means you can make and save changes in the board, mark that trial active, and navigate to the student's schedule to see how things look *as many times as you need to*.
- Work in the Scheduling Board to get as close to 100% requests complete as possible, knowing that at least some student schedules need to have gaps filled or be hand-scheduled throughout the summer. A percentage of 75-85% complete is great!
- Course sections can be moved or rebuilt many times, and sections can be loaded and unloaded many times. Keep working! You'll know when it's time to stop.

Let's get started!

NOTE: When saving changes takes minutes to complete AND your state uses Ed-Fi for collecting student and school data, verify [Ed-Fi Configurations](#) for past school years have been deleted.

The current school year and the last school year can remain. For example, a district that has configurations for the 2019-20, 2020-21, 2021-22 and 2022-23 school years can safely delete the 2019-20 and 2020-21 configurations.

Choose Settings for the Scheduling Board

See the [Settings](#) section for more information.

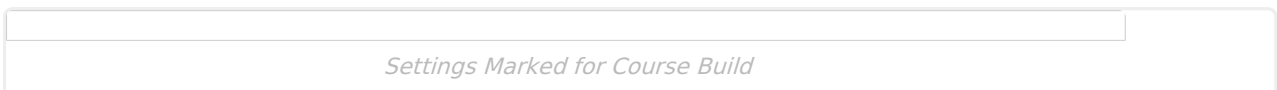
These settings are defined [here](#).



1. Select the **Set Placement Type** and the **Set Period Axis** preference.
2. Select the **Settings** button and mark the desired options in the **View Side Panel** opens. This includes:
 - Selecting which items to highlight in **Red** as a **Conflict**, in **Green** as **Missing Data**, and in **Yellow** as a **Highlight**.
 - Selecting which items to **View on Section** and to **View Locked**.
 - Selecting which **Terms, Period Schedules and Periods** to Show or Hide.
 - Selecting which **Departments** to display as Show or Hide.
 - Selecting which **Courses** to display as Show or Hide.
 - Selecting whether to **Hide All But Singletons**.
 - Selecting whether to **Hide All Exception/Special Days**.
3. Click the **Save** button when finished. All selected options are now set and courses can now be built.

These settings can be changed at any time, or completely reset to return to the default settings.

The image below shows what the Board may look like when Settings have been marked to show conflicts, missing data and highlight courses and courses have been built and loaded.



Build

First, verify your [Build Settings](#) are marked appropriately.

1. Click the **Build** button in the Action Bar across the bottom, and choose **Settings**.
2. In the Build side panel, review the options listed and make any changes necessary.
3. Click **Save** when finished.

Screenshot of the Build Settings Side Panel.

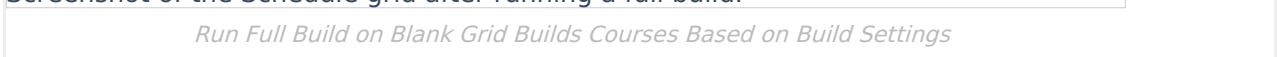


Next, build the courses.

Build All Courses

1. Click the **Build** button in the Action Bar across the bottom.
2. Choose **Run Full Build**. A Building progress bar displays indicating how far along the build is. This process is fairly quick. For larger schools and schools with several terms, period schedules and periods, it may take longer to build.
3. When the Build is finished, course sections are visible in the board based on the selected Build Settings.

Screenshot of the Schedule grid after running a full build.



At this point, you can:



- Work with an individual course to load sections for it manually.
- Load the course sections for a specific Department.
- Move placed courses around to different periods to see what that does to the other courses.
- Load the course sections to see how the course sections populate.

Unbuild All Courses

It's possible the building of the courses was done prematurely, or you want to load only certain courses first. Removing the placed courses can be done at anytime and as often as needed.

1. Click the **Build** button in the Action Bar across the bottom.
2. Choose **Run Full Unbuild**. This removes any course that has been placed on the board that is not locked. A Building progress bar displays indicating how far along the unbuild is.
3. When finished, the board is empty, unless that section was locked.

Load All Courses

Loading is done AFTER Building. It loads the student requests into the course sections that were built. Like the Build option, loading can be done for a specific course, a particular department or a particular section. Or, load all courses all at once to see how many student requests are met.

First, verify your [Load Settings](#) are marked appropriately.

1. Click the **Load** button in the Action Bar across the bottom, and choose **Settings**.
2. In the **Load** side panel, review the options listed and make any changes necessary.
3. Click **Save** when finished.

Screenshot of the Load Settings Side Panel

Load Settings

Second, set your [Section Balance Settings](#).

1. Click the **Load** button in the Action Bar across the bottom, and choose **Section Balance**.
2. In the **Section Balance** side panel, set the preferences for the listed factors in one of three ways:
 - Click the left pointing arrows (changes the value to be closer to zero) or right pointing arrows (changes the value to be closer to 100).
 - Click and drag the blue ball on the slider to the desired value.
 - Enter the desired value in text box to the right.
3. Click **Save** when finished.

Screenshot of the Scheduling Board Load Options for the Section Balance Side Panel

Section Balance Settings

Next, load the courses.

Load All Courses



1. Click the **Load** button in the Action Bar across the bottom.
2. Choose **Run Full Load**. A Building progress bar displays indicating how far along the build is. This process is fairly quick. For larger schools and schools with several terms, period schedules and periods, it may take longer to build.
3. When the Load is finished, course sections now display on the grid and most sections have a count total.

Screenshot of the count of students placed into a section

Run Full Load

In the image above, the Keyboarding class had 26 requests fulfilled, and there are 30 possible seats for that section.

At this point, you can:

- Unload the sections and change Settings to see how that changes the build.
- Work with an individual course section to alter how it is loaded by changing the maximum students allows in the section or load by grade level and gender.
- Unload the section or all sections, and start over.

Unload All Courses

It's possible the loading of the course sections was done prematurely, or you want to load only certain courses first. Removing the placed course sections can be done at anytime and as often as needed.

1. Click the **Load** button in the Action Bar across the bottom.
2. Choose **Run Full Unload**. This removes a student from that section, as long as the rosters were not locked.
3. When the unload is finished, the courses no longer have requests placed.

Lock Rosters

In a school that has a small student population, limited course offerings and a standard schedule, this first build of the courses and the first load of the requests may have met your completed schedules threshold. You can lock the rosters now!

Lock All Rosters

1. Click the **Lock Rosters** button. A **Lock All Rosters by Grade** side panel opens.
2. All grade levels are selected automatically. When all rosters for all grade levels should be locked, click the **Lock** button at the bottom of the panel; when rosters for a certain grade level should be locked, remove the checkbox from the other grade levels and click the **Lock** button.
3. The board processes for a short time. When it's finished, a green message displays indicating rosters have been locked. When the [Display Settings for View Locked](#) are marked for **Rosters**, the course sections display with a crossed out student image, indicating the roster has been locked.



Screenshot of the sections with locked rosters

Lock Rosters

Unlock All Rosters

It's possible the locking of rosters was done prematurely and you want to unlock all course sections. Or, you meant to only lock the seniors scheduled into those sections. Unlocking the sections can be done at anytime and as often as needed.

1. Click the arrow next to the **Lock Rosters** button in the Action Bar across the bottom.
2. Choose **Unlock Rosters**. The **Unlock All Rosters by Grade** side panel displays.
3. Remove the checkbox from the desired grade levels to leave some rosters locked and some unlocked. Or leave all grade levels marked for unlocking.
4. Click **Unlock**. When the process finishes, the course section rosters are no longer locked.

Build, Move and Delete Course Sections using Drag and Drop

The Scheduling Board is designed to build all course sections for the entire school as easily and as quickly as possible. There are situations where certain courses are best built manually, like when that course is a singleton or when that course meets just once in a specific term in a specific period.

Build New Course Sections

The Scheduling Board allows courses and sections to be dragged onto the grid and placed where they best meet the needs of the course and students who requested the course. This requires the [Build Setting](#) of **Drag and Drop: Enable preferred section placement** to be marked. A Conflict Matrix or "heat map" locates the best placements for that section. The three best placements for that new section are displayed, and includes the teacher and room assignments. The first placement is the same location the Auto-Build logic would choose when a single section were placed.

1. Locate the course to build.
2. Click on it and drag it into the period grid.
3. Drop it in the desired period. The section is placed and the build for the section is locked.
4. At this point, requests can be loaded, teachers and rooms can be assigned, plus other options listed in the section side panel.

Drag and Drop Course Section

When a Course has placement restrictions (entered from the Course Planner), attempting to manually place a section in that restricted period shows an icon indicating it cannot be placed there (⊘).



Move Course Sections

Moving course sections also uses a Conflict Matrix to determine the best placement for a section. The three best placements for that new section are displayed, and includes the teacher and room assignments. The first placement is the same location the Auto-Build logic would choose when a single section were placed.

When a course is built, sometimes just one section of the course needs to be moved to a different period. Use the same process of selecting that section and dragging it to a new period and dropping it.

1. Locate the section on the grid that needs to be moved.
2. Click on it and drag it into the desired period.
3. Drop it in the desired period. The section is placed in the new period and the build for the section is locked.
4. At this point, requests can be loaded, teachers and rooms can be assigned, plus other options listed in the section side panel.

Drag and Drop Assigned Period

Delete Course Sections

Delete a section by dragging the section completely to the left on the course grid.

Delete a Drag and Drop Section

Print

Click the **Print** button to display the scheduling board in a printable view. Departments that are collapsed display as collapsed in the printed view, meaning no courses or sections are visible for those collapsed departments. The printed report displays the course and section information in the assigned periods, as well as the seat count for that section.

Screenshot of the Scheduling Board print report in PDF format.

Scheduling Board Print - PDF Format

Scheduling Board Print - XSLX Format

Next Steps

- Continue loading and unloading courses, and moving course sections on the grid to get to your desired percentage of requests satisfied. When you get to that point, mark the **Scheduling Board Trial** active and congratulate yourself!



- Access the [Staff Planner](#) and [Course Planner](#) to aid in the scheduling of the course sections.
- Refer to the [Scheduling Center](#) to see what other actions need to be taken for scheduling.
- Refer to the [Beginning of Year](#) checklist to see what other tasks can be considered complete for the beginning of the school year.

Previous Versions

[Scheduling Board \[.2315 - .2319\]](#)
