

# Scheduling Board [.2315 - .2319]

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You are viewing a previous version of this article. See [Scheduling Board](#) for the most current information.

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**Classic View:** [Scheduling](#) > [Scheduling Board](#)

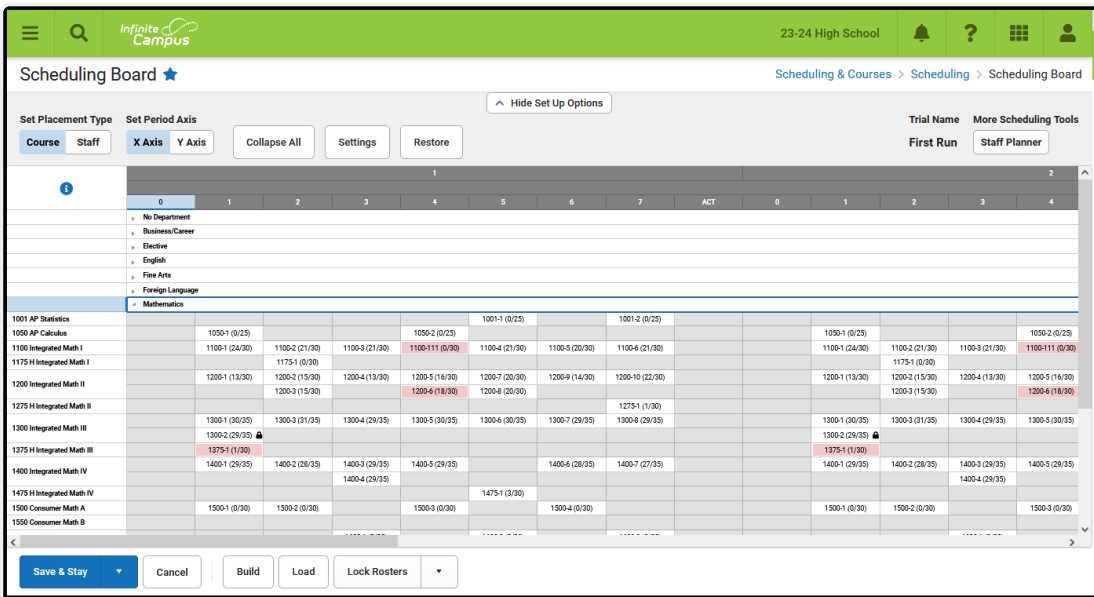
**Search Terms:** [Scheduling Board](#)

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](#) | [Percentages](#)

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.

The screenshot shows the 'Scheduling Board' interface. At the top, there are navigation links: 'Scheduling & Courses > Scheduling > Scheduling Board'. Below the navigation, there are two main sections: 'Set Placement Type' with 'Course' and 'Staff' buttons, and 'Set Period Axis' with 'X Axis' and 'Y Axis' buttons. To the right of these are 'Collapse All', 'Settings', and 'Restore' buttons. Further right, there are 'Trial Name' (set to 'Demo') and 'More Scheduling Tools' (with a 'Staff Planner' button). The main grid shows a 'Daily' schedule with columns 1-4 and rows 0-7. The 'Business/Career' section is expanded, showing courses like '8000-1 (27/30)', '8000-2 (26/30)', '8000-3 (26/30)', '8000-4 (26/30)', '8025-1 (24/30)', '8025-4 (30/30)', and '8025-5 (30/30)'. At the bottom, there is a row of action buttons: 'Save & Stay', 'Cancel', 'Build', 'Load', and 'Lock Rosters'.

*Scheduling Board Settings*

At 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.

This screenshot is identical to the one above, but with a red rectangular box highlighting the bottom row of action buttons: 'Save & Stay', 'Cancel', 'Build', 'Load', and 'Lock Rosters'.

*Scheduling Board Actions*

## Settings

▶ [Click here to expand...](#)

## Actions

▶ [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.

▶ [Click here to expand...](#)

## Percentages

The information icon in the left corner displays statistics for the selected trial. The first statistic, **Requests**, indicates the number of requests satisfied over the total requests for all students, and the percentage of those two values. The second statistic, **All Requests Satisfied**, indicates 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.

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.

The screenshot shows a 'Show Stats' popup window overlaid on a scheduling board. The popup contains the following information:

- Requests: 6892/7307 94.32%
- All Requests Satisfied: 674/850 79.29%

The background interface includes a 'Show Stats' button in the top left corner, which is highlighted with a red box and a red arrow pointing to the popup. The scheduling board itself shows a grid of course sections with columns for 'Set Placement Type' (Course, Staff) and 'Set Period Axis' (X Axis, Y Axis). Buttons for 'Collapse All', 'Settings', and 'Restore' are visible at the top of the grid.

These same values also display on the [Scheduling Board Trials](#) side panel.

# 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](#).

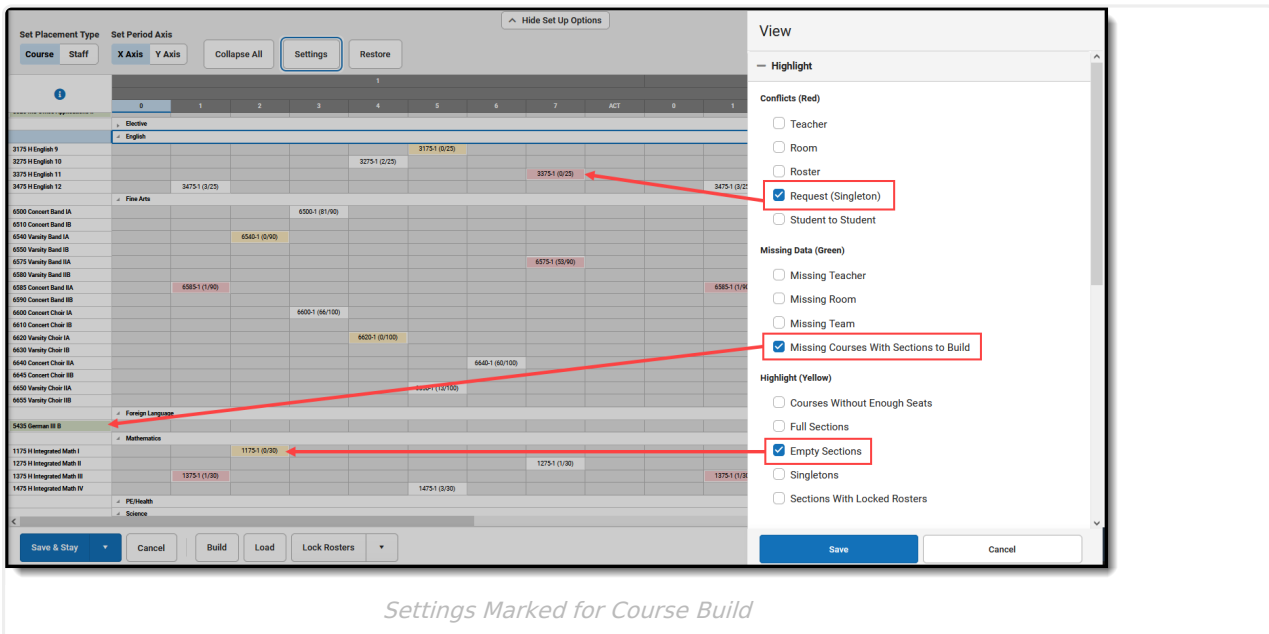
1. Select the **Set Placement Type** and the **Set Period Axis** preference.
2. Select the **Settings** button and mark the desired options in the **View Side Panel** opens. This

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 All Courses

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.

Build Settings

Next, build the 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.

*Run Full Build on Blank Grid Builds Courses Based on Build Settings*

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.

*Load Settings*

Next, load the 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.

*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 All 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!

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.

Set Placement Type    Set Period Axis

	0	1	2	3	4	5	6	7	AC
<b>Elective</b>									
3510 Yearbook Semester I			3510-1 (5/15)	3510-2 (2/15)					
3520 Yearbook Semester II									
<b>English</b>									
3100 English 9	3100-1 (22/25)	3100-2 (22/25)	3100-3 (21/25)	3100-4 (21/25)	3100-5 (22/25)	3100-6 (22/25)	3100-7 (21/25)	3100-8 (21/25)	
3175 H English 9						3175-1 (0/25)			
3200 English 10	3200-1 (23/25)	3200-2 (24/25)	3200-3 (25/25)	3200-4 (24/25)	3200-5 (25/25)	3200-6 (24/25)	3200-7 (24/25)	3200-8 (24/25)	
3275 H English 10					3275-1 (2/25)				
3300 English 11	3300-1 (23/25)	3300-2 (23/25)	3300-3 (24/25)	3300-5 (23/25)	3300-6 (24/25)		3300-8 (24/25)	3300-9 (24/25)	
3375 H English 11		3300-2 (23/25)	3300-15 (14/14)		3300-7 (23/25)				3375-1 (4/25)
3400 English 12	3400-1 (23/25)	3400-2 (24/25)	3400-3 (23/25)	3400-4 (24/25)		3400-5 (24/25)	3400-6 (24/25)	3400-7 (23/25)	3400-8 (24/25)
3475 H English 12	3475-1 (3/25)								
3600 AP Literature									
3650 AP Composition									3650-1 (5/20)
3700 American & British Literature									
3725 World Literature						3725-1 (4/25)	3725-2 (3/25)		
3750 Gothic Literature			3750-1 (2/25)						
3775 Mythology				3775-1 (1/25)	3775-2 (1/25)				

*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

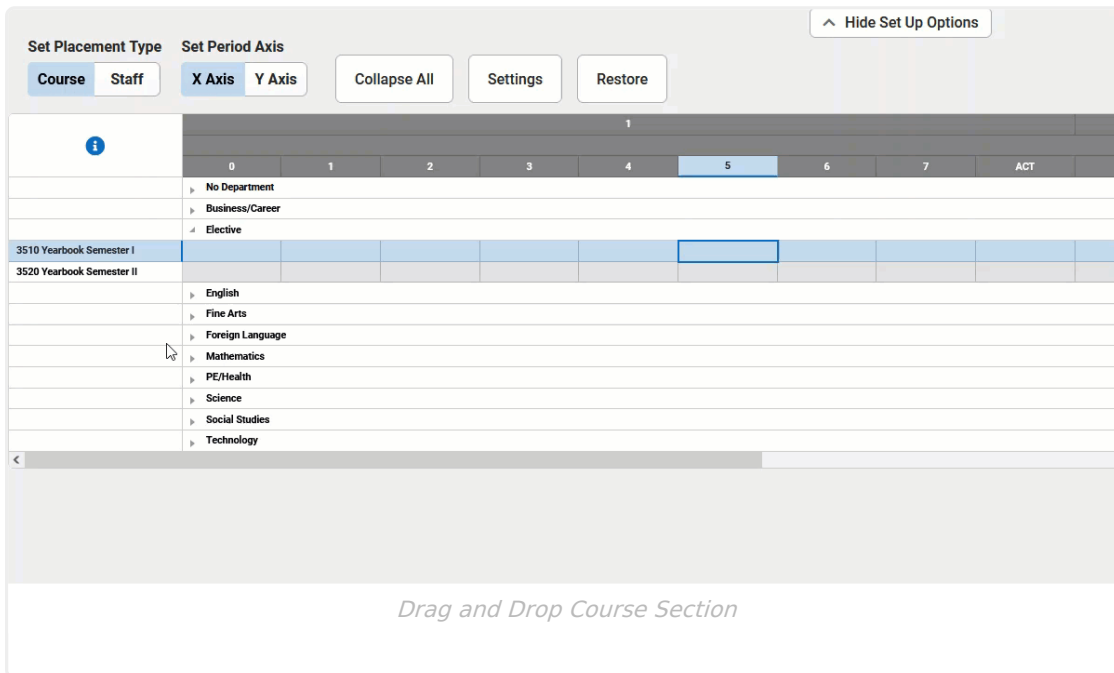
The Scheduling Board is designed to build all course sections for the entire school as easily and as quickly as possible. There are situations where certain courses are best built manually, like when that course is a singleton or when that course meets just once in a specific term in a specific period.

## 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.



## 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.

Set Placement Type Set Period Axis Hide Set Up Options

Course Staff X Axis Y Axis Collapse All Settings Restore

	0	1	2	3	4	5	6	7
No Department								
Business/Career								
Elective								
3510 Yearbook Semester I				3510-1 (0/15)				
3520 Yearbook Semester II								
English								
Fine Arts								
6000 2D Foundations A		6000-1 (0/30)		6000-2 (0/30)				
6050 2D Foundations B								
6100 3D Foundations A				6100-1 (0/30)	6100-2 (0/30)			
6150 3D Foundations B								
6200 Studio Art: Painting								
6210 Studio Art: Drawing		6210-1 (0/25)		6210-2 (0/25)				
6220 Studio Art: Photography						6220-1 (0/25)	6220-2 (0/25)	
6250 Photo Finish								
6320 Studio Art: Ceramics						6320-1 (0/20)	6320-2 (0/20)	
6321 Advanced Ceramics		6321-1 (0/20)						
6330 Studio Art: Jewelry								6330-1 (0/25)
6410 Art History					6410-1 (0/30)			
6500 Concert Band IA				6500-1 (0/90)				
6510 Concert Band IB								
6540 Varsity Band IA					6540-1 (0/90)			
6550 Varsity Band IB								

Save & Stay Cancel Build Load Lock Rosters

Drag and Drop Assigned Period

## Delete Course Sections

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

Set Placement Type Set Period Axis Hide Set Up Options

Course Staff X Axis Y Axis Collapse All Settings Restore

Trial Name: SME New Trial 0313 (Active) More Scheduling Tools

	0	1	2	3	4	5	6	7	ACT	8	9	10	11	12
No Department														
Business/Career														
Elective														
3510 Yearbook Semester I				3510-1 (0/15)									3510-1 (0/15)	
3520 Yearbook Semester II														
English														
Fine Arts														
6000 2D Foundations A		6000-1 (0/30)		6000-2 (0/30)										
6050 2D Foundations B														
6100 3D Foundations A				6100-1 (0/30)	6100-2 (0/30)									
6150 3D Foundations B														
6200 Studio Art: Painting														
6210 Studio Art: Drawing		6210-1 (0/25)		6210-2 (0/25)										
6220 Studio Art: Photography						6220-1 (0/25)	6220-2 (0/25)							
6250 Photo Finish														
6320 Studio Art: Ceramics						6320-1 (0/20)	6320-2 (0/20)							
6321 Advanced Ceramics		6321-1 (0/20)												
6330 Studio Art: Jewelry														6330-1 (0/25)
6410 Art History					6410-1 (0/30)									
6500 Concert Band IA				6500-1 (0/90)										
6510 Concert Band IB														
6540 Varsity Band IA					6540-1 (0/90)									
6550 Varsity Band IB														

Delete a Drag and Drop Section

# 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.
-