

# Staff Planner [.2303 - .2319]

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

[Tool Rights](#) | [Staff Planner Logic](#) | [Navigation of Staff Planner](#) | [Staff Planner Layout](#) | [Next Steps](#)

**Classic View:** Scheduling > Scheduling Center > Staff Planner

**Search Terms:** 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 Schedule Wizard is still available and can be used interchangeably with this new Staff Planner.

The screenshot shows the 'Staff Planner' tool interface. It lists several teachers with their assigned courses, periods, and room assignments. Each teacher entry includes a 'PLACEMENT RESTRICTIONS' button. The top navigation bar includes 'Scheduling & Courses > Scheduling > Staff Planner' and various tool buttons like 'Show Details', 'Course Planner', and 'Scheduling Board'.

Staff Planner

## 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).

## Tool Rights

**Classic View:** System Administration > User Security > Users > Tool Rights > Scheduling > Scheduling Center > Staff Planner

Access to the Staff Planner requires the following:

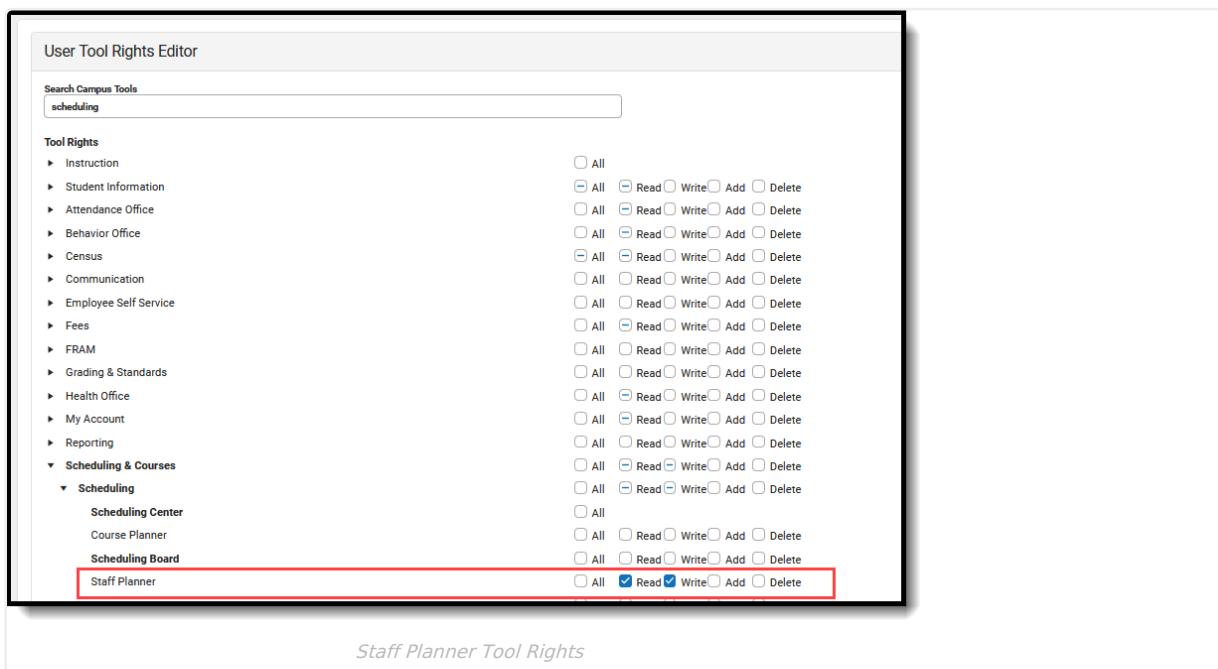
**Read Rights:**

- 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.

Add and Delete rights provide no additional functionality.



The screenshot shows the 'User Tool Rights Editor' interface. In the search bar, 'scheduling' is typed. The 'Tool Rights' tree view includes categories like Instruction, Student Information, Attendance Office, Behavior Office, Census, Communication, Employee Self Service, Fees, FRAM, Grading & Standards, Health Office, My Account, Reporting, Scheduling & Courses, Scheduling, Scheduling Center, Course Planner, Scheduling Board, and Staff Planner. The 'Staff Planner' node is selected and highlighted with a red box. To the right of the tree, there are four columns of checkboxes for 'All' rights: Read (checked), Write (checked), Add (unchecked), and Delete (unchecked).

## Staff Planner Logic

When selecting a room for a placed Section, the logic in the build process used in the Schedule Wizard 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.

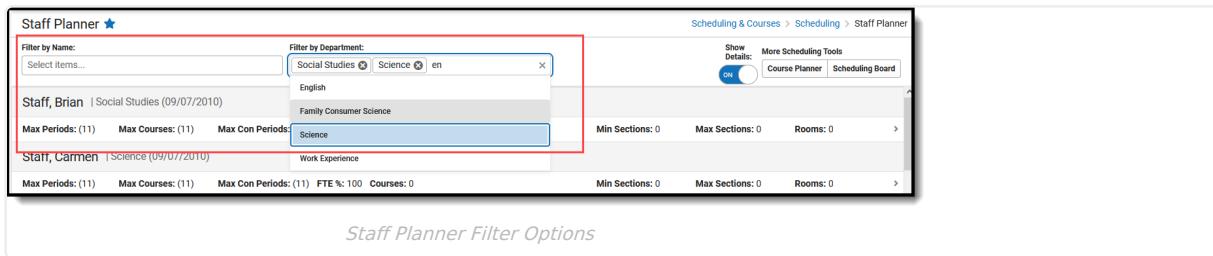
## Navigation of Staff Planner

[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.

## Filter Options

Use the **Filter by Name** and/or **Filter by Department** options to assign courses and rooms for a particular staff person or for an entire department. 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 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 (System Administration > Resources > Resources > Departments) and Departments must be assigned to the staff person's [District Assignment](#) (Census > People > District Assignments).

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 November 2017 and one for English with a start date of October 2022. 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 by Name:  Filter by Department:

Staff, Aaron | Science (11/27/2017) | English (10/03/2022)

Max Periods: 5 Max Courses: (7) Max Con Periods: 6 FTE %: 71 Courses: 1

**District Assignments ★**  
Staff, Aaron DOB: 11/27/2017

**Assignments**

- High School
  - Teacher - (11/27/2017-)
  - Teacher - Literacy Specialist - (10/03/2022-)
  - Teacher - (06/25/2011-06/24/2015)

*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 by Name:  Filter by Department:

Staff, Jana A | Elective (08/26/2015)

Max Periods: (7) Max Courses: (7) Max Con Periods: (7) FTE %: 100 Courses: 6

1175 H Integrated Math I  
1275 H Integrated Math II  
1375 H Integrated Math III  
1475 H Integrated Math IV  
3510 Yearbook Semester I  
3520 Yearbook Semester II

Staff, Kevin | (10/13/2008)

Max Periods: (7) Max Courses: (7) Max Con Periods: (7) FTE %: 100 Courses: 0

Staff, Lin | Business/Career (07/05/2011)

Max Periods: (7) Max Courses: (7) Max Con Periods: (7) FTE %: 100 Courses: 3

8025 Personal Finance  
8200 Accounting I  
8250 Accounting II

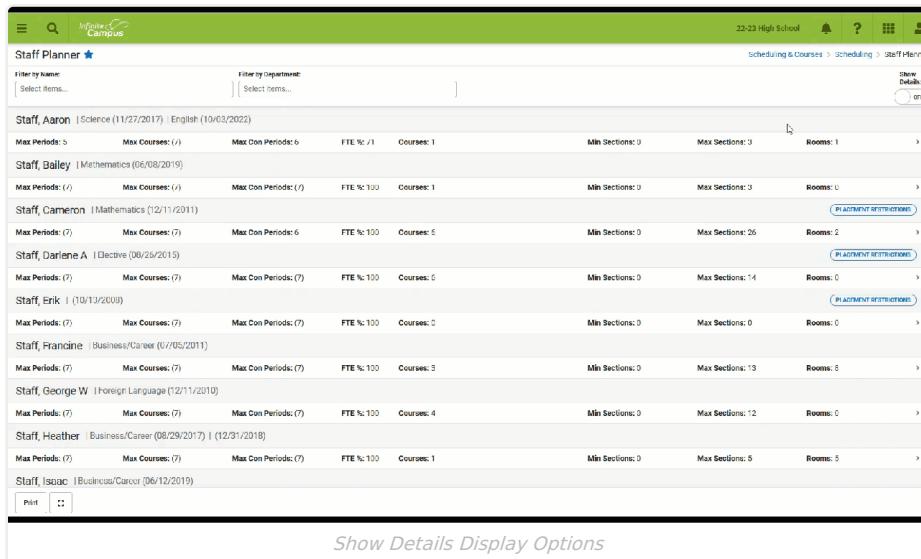
*Staff Planner - No Department Assigned*

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.



The screenshot shows a grid of staff members with their course assignments. Each row contains the following information:

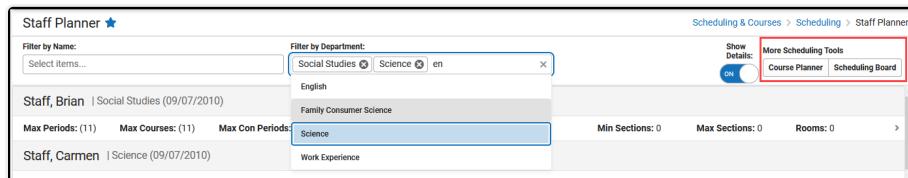
- Staff Member:** Name, hire date, and department.
- Max Periods:** The number of periods the staff member can be assigned.
- Max Courses:** The number of courses the staff member can be assigned.
- Max Con Periods:** The number of concurrent periods the staff member can be assigned.
- FTE %:** The percentage of full-time equivalent work.
- Courses:** The number of courses assigned to the staff member.
- Min Sections:** The minimum number of sections assigned.
- Max Sections:** The maximum number of sections assigned.
- Rooms:** The number of rooms assigned.
- Actions:** Buttons for 'Edit' and 'Delete'.

Show Details 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.



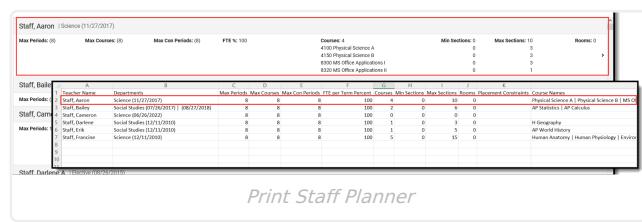
The screenshot shows the Staff Planner grid with the 'More Scheduling Tools' button highlighted in a red box. The button is labeled 'ON' and has three options: 'Course Planner', 'Scheduling Board', and 'Staff Planner'. The 'Course Planner' and 'Scheduling Board' options are also highlighted in red.

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.

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 screenshot shows the Staff Planner grid with the 'Print Staff Planner' button highlighted in a red box. The button is labeled 'Print Staff Planner'.

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.

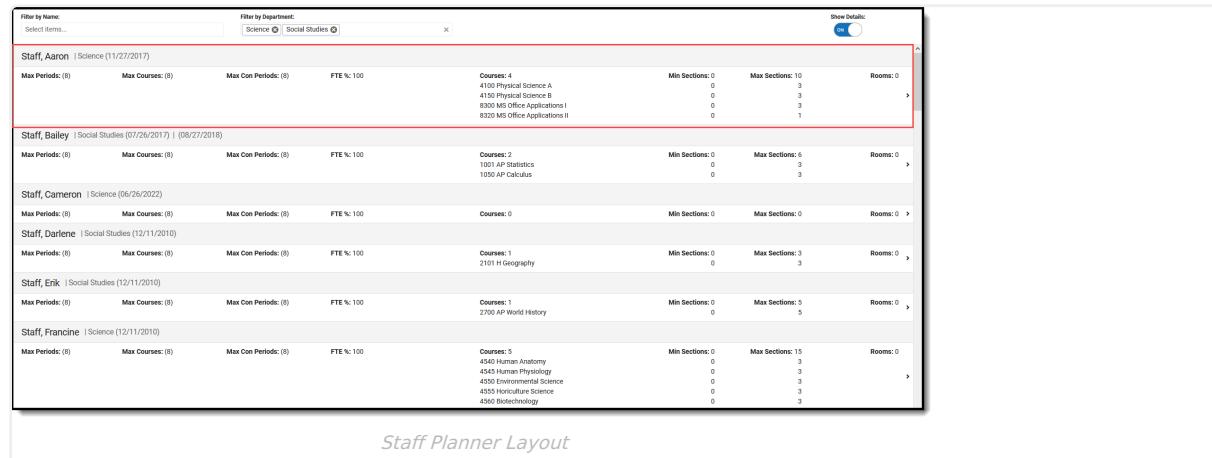


Full Screen Display

## 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 behind their name in parentheses.

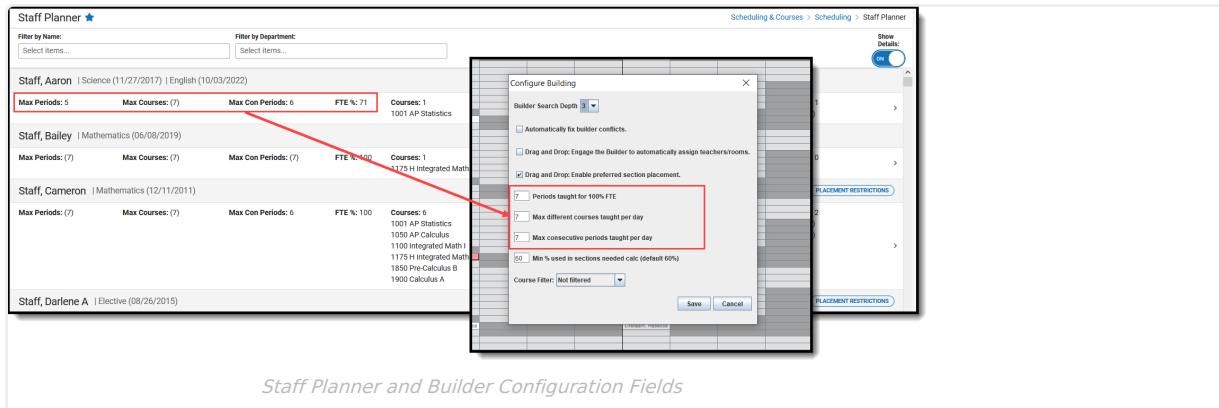


Staff Planner Layout

## 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 four fields on the Staff Planner are pulled from the [Builder Configuration](#) tool on the Scheduling Wizard Whiteboard. Click the Expand section below for descriptions of all listed fields.



Staff Planner ★

Filter by Name:  Filter by Department:

Staff, Aaron | Science (11/27/2017) | English (10/03/2022)

Max Periods: 5 Max Courses: (?) Max Con Periods: 6 FTE %: 71 Courses: 1 1001 AP Statistics

Staff, Bailey | Mathematics (06/08/2019)

Max Periods: (?) Max Courses: (?) Max Con Periods: (?) FTE %: 100 Courses: 1 1175 H Integrated Math I

Staff, Cameron | Mathematics (12/11/2011)

Max Periods: (?) Max Courses: (?) Max Con Periods: 6 FTE %: 100 Courses: 6 1001 AP Statistics 1050 AP Calculus 1101 Integrated Math I 1175 H Integrated Math I 1850 Pre-Calculus B 1900 Calculus A

Staff, Darlene A | Elective (08/26/2015)

Configure Building

Builder Search Depth: 3

Automatically fix builder conflicts.

Drag and Drop: Engage the Builder to automatically assign teachers/rooms.

Drag and Drop: Enable preferred section placement.

Periods taught for 100% FTE

Max different courses taught per day

Max consecutive periods taught per day

60 Min % used in sections needed calc (default 60%)

Course Filter: Not filtered

Save Cancel

Staff Planner and Builder Configuration Fields

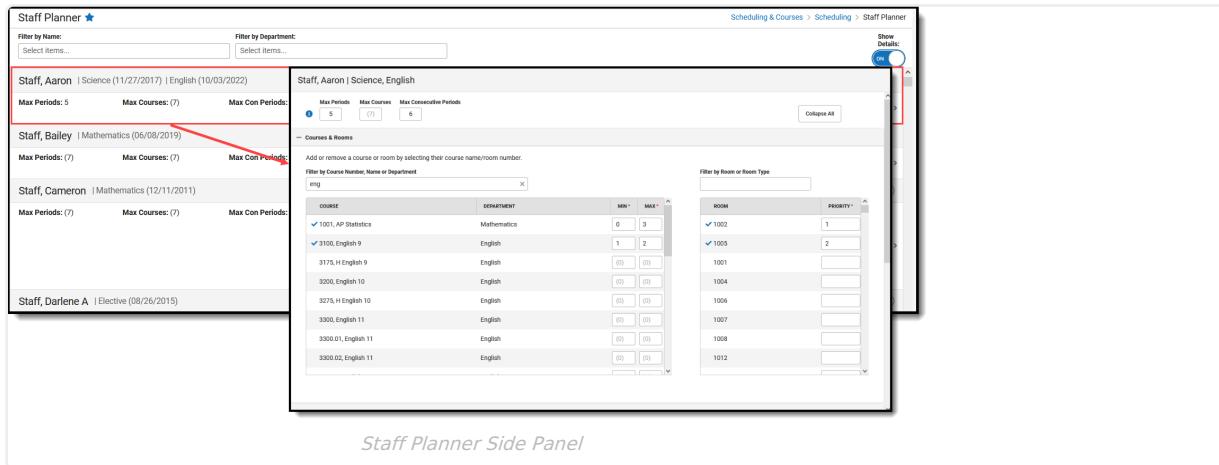
► [Click here to expand...](#)

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

Fields	Description	Builder Configuration Field
<b>FTE</b>	<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="457 1343 970 1439" style="border: 1px solid #ccc; padding: 5px; background-color: #fff;"> <p>The FTE fields on the <a href="#">District Assignment</a> and the <a href="#">District Employment</a> records ARE NOT THE SAME AS and DO NOT affect this field.</p> </div>	Max Periods divided by the default value of Periods Taught for 100% (whatever shows in parens)
<b>Courses</b>	Number of courses that are currently assigned to the teacher.	N/A
<b>Min Sections</b>	Least amount of sections that can be assigned to the teacher.	N/A
<b>Max Sections</b>	Most amount of sections that can be assigned to the teacher.	N/A
<b>Rooms</b>	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.

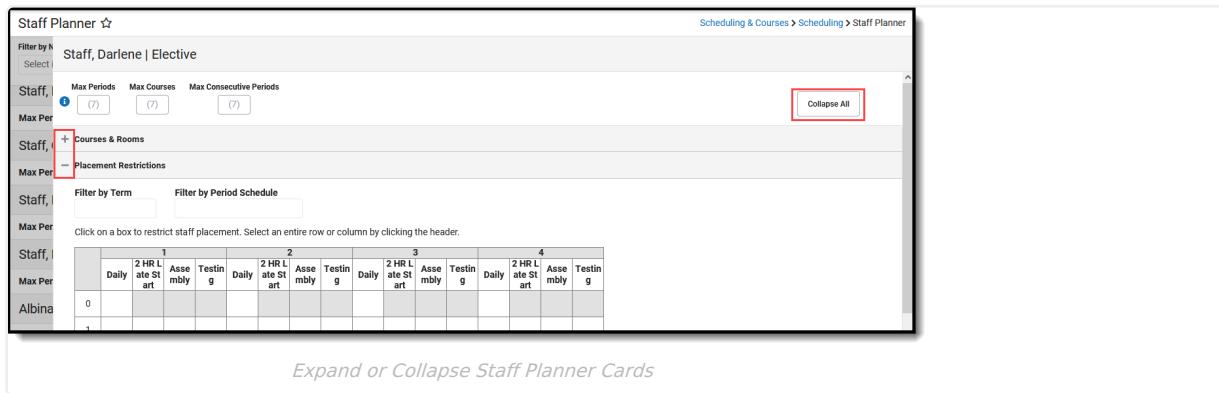


The screenshot shows the Staff Planner Side Panel for Staff, Aaron. It displays course assignments for Science, English, and Mathematics across different periods. The side panel includes sections for Courses & Rooms and Placement Restrictions. A red arrow points to the 'Courses & Rooms' section, highlighting the 'Collapse All' button.

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**.



The screenshot shows the Staff Planner Side Panel for Staff, Darlene. The 'Courses & Rooms' and 'Placement Restrictions' cards are expanded, showing detailed data. A red box highlights the 'Collapse All' button in the top right corner of the expanded 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, Bailey   Mathematics	Adjusted value in Staff Planner	Max Con Periods: (7)	FTE %: 100	Courses: 0
Max Periods: 7				
Staff, Cameron   Mathematics (12/11/2011)				
Max Periods: (7)	Max Courses: (7)	Max Con Periods: (7)	FTE %: 100	Courses: 0

Staff, Darlene   Elective (08/26/2015)	Default Values from Builder Configuration	Con Periods: (7)	FTE %: 100	Courses: 0
Max Periods: (7)	Max Courses: (7)			
Staff, Erik   (10/13/2008)				

*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.

Staff Planner ☆		Scheduling & Courses > Scheduling > Staff Planner		
Filter by Name Select		Staff, Cameron   Mathematics		
Staff, Cameron	Max Periods	Max Courses	Max Consecutive Periods	
Max Periods: (7)	(7)	(7)	(7)	Expand All
Staff, Cameron	+ Courses & Rooms			
Max Periods: (7)	+ Placement Restrictions			
Staff, Cameron	Max Periods: (7)			

*Adjusting Max Periods, Courses, Consecutive Periods Values*

## Course and Room Selection

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

- 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

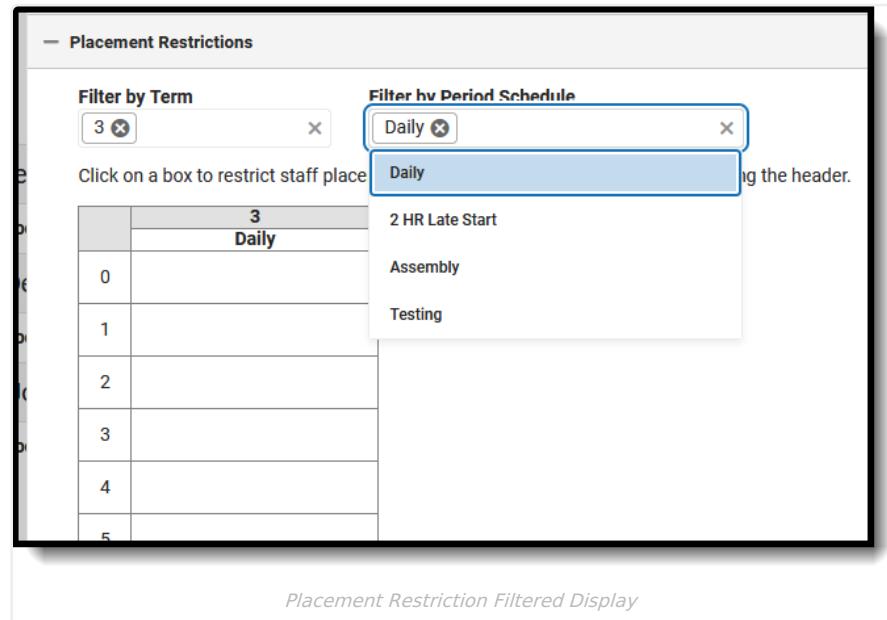
1. Filter the list of rooms to those appropriate for the selected courses.
2. Select the desired rooms for the teacher's courses by clicking in that room row. A blue checkmark displays next to selected rooms. When more than one room is selected for a particular course, or there are several rooms in which 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

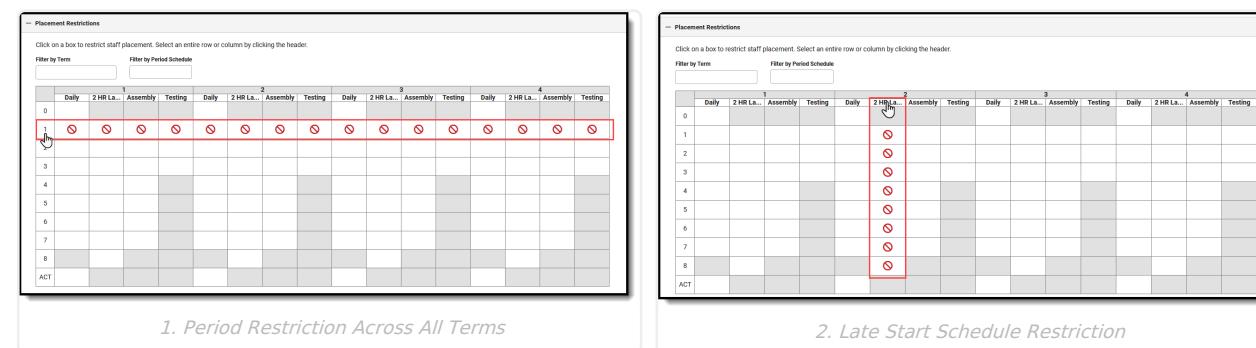
The Placement Restrictions section creates a constraint on that period and term. This restriction can be for a selected period, a term or a schedule, or a combination of each. The restriction indicates a section is not placed in that period, schedule, or term.

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 (first image); to a period schedule by clicking that schedule name (second image); for an entire term by clicking the term number (image 3); for a single period (image 4).



1. Period Restriction Across All Terms

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

	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																

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

	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. Third Term Restriction*

*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.

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  Testing  

	1	2	3	4
0	Testing	Testing	Testing	Testing
1			🚫	
2			🚫	
3			🚫	
4				
5				

**Warning** 

Changes have been made to hidden Terms or Period Schedules. Are you sure you want to save without viewing?

Don't show again. Save Cancel

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.

3	
4	
5	
6	
7	
8	
ACT	

[Save & Next](#) [Cancel](#) [< Prev - Staff, Darlene A](#) [Staff, Erik - Next >](#)

## 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.
- Generate [scheduling reports](#) to review the placement of courses.
- When all scheduling items have been completed, mark the [Scheduling Board Trial](#) active.

