

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.

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Classic View: Scheduling > Scheduling Center > Staff Planner

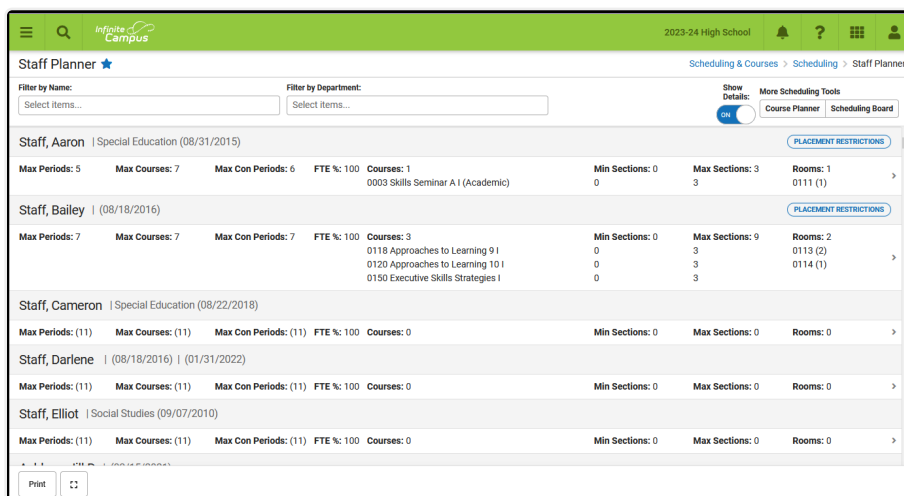
Search Terms: Staff Planner

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.



Staff Name	Department	Max Periods	Max Courses	Max Con Periods	FTE %	Courses	Min Sections	Max Sections	Rooms
Staff, Aaron	Special Education (08/31/2015)	5	7	6	100	0003 Skills Seminar A I (Academic)	0	3	0111 (1)
Staff, Bailey	(08/18/2016)	7	7	7	100	0118 Approaches to Learning 9 I 0120 Approaches to Learning 10 I 0150 Executive Skills Strategies I	0	9	0113 (2) 0114 (1)
Staff, Cameron	Special Education (08/22/2018)	(11)	(11)	(11)	100	0	0	0	0
Staff, Darlene	(08/18/2016) (01/31/2022)	(11)	(11)	(11)	100	0	0	0	0
Staff, Elliot	Social Studies (09/07/2010)	(11)	(11)	(11)	100	0	0	0	0

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:

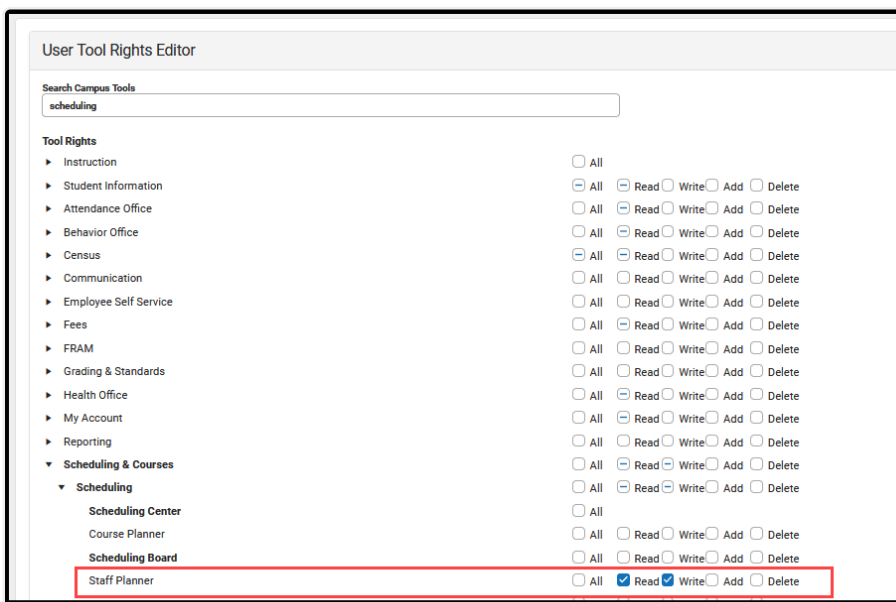
Read Rights:

- 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' window. At the top, there is a search bar labeled 'Search Campus Tools' with the word 'scheduling' entered. Below this is a list of tool rights categories on the left, including 'Instruction', 'Student Information', 'Attendance Office', 'Behavior Office', 'Census', 'Communication', 'Employee Self Service', 'Fees', 'FRAM', 'Grading & Standards', 'Health Office', 'My Account', 'Reporting', 'Scheduling & Courses', and 'Scheduling'. The 'Scheduling & Courses' category is expanded, showing 'Scheduling Center', 'Course Planner', 'Scheduling Board', and 'Staff Planner'. The 'Staff Planner' item is highlighted with a red box. To the right of the list, there are checkboxes for 'All', 'Read', 'Write', 'Add', and 'Delete'. For the 'Staff Planner' item, the 'Read' and 'Write' checkboxes are checked, while 'All', 'Add', and 'Delete' are unchecked.

Staff Planner Tool Rights

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.

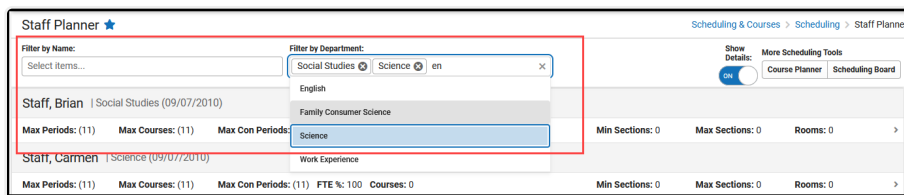
Navigation of Staff Planner

[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.



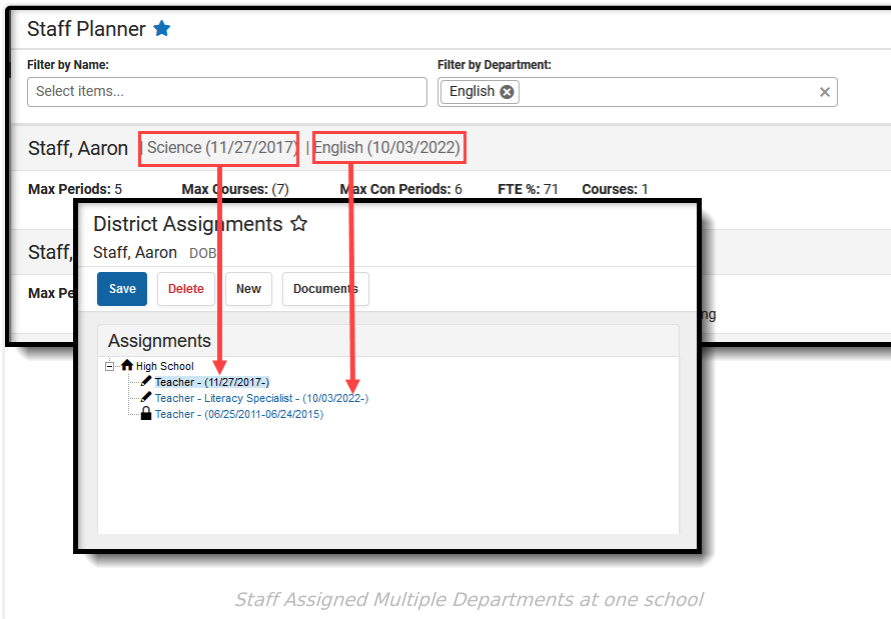
The screenshot shows the 'Staff Planner' interface. On the left, there are two filter fields: 'Filter by Name' and 'Filter by Department'. The 'Filter by Name' field contains the text 'Staff, Brian'. The 'Filter by Department' dropdown menu is open, showing a list of departments: 'English', 'Family Consumer Science', and 'Science'. The 'Science' option is highlighted. Below the filters, there is a table of staff members. The first row shows 'Staff, Brian' with a department of 'Social Studies' and a date of '09/07/2010'. The second row shows 'Staff, Carmen' with a department of 'Science' and a date of '09/07/2010'. The table also includes columns for 'Max Periods', 'Max Courses', 'Max Con Periods', 'FTE %', and 'Courses'. On the right side of the interface, there are buttons for 'Show Details', 'More Scheduling Tools', 'Course Planner', and 'Scheduling Board'.

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).

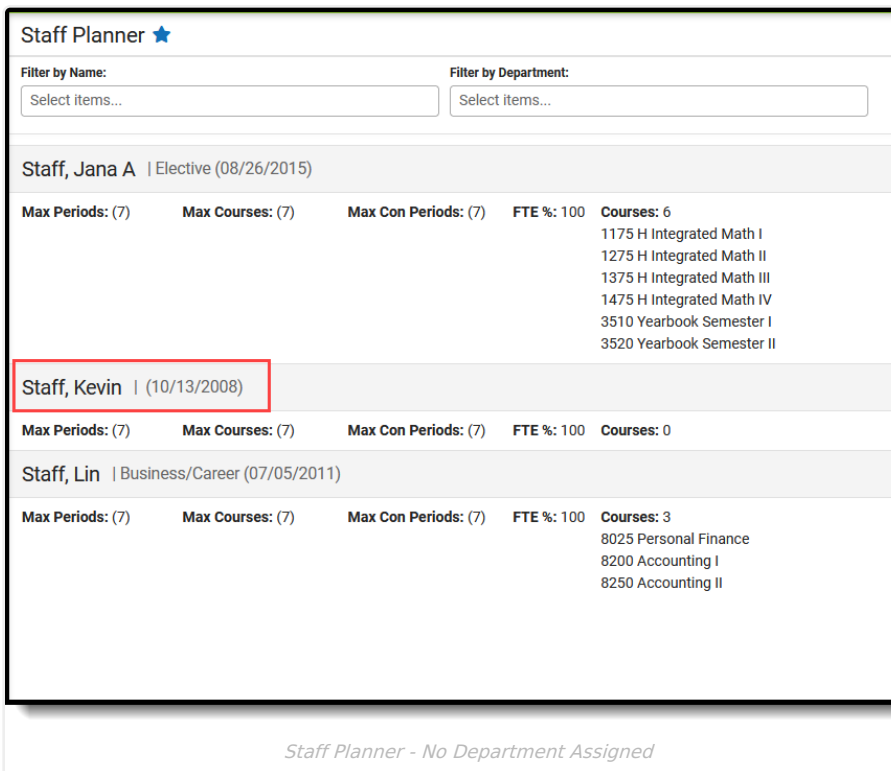
Selected Filter By options remain when navigating to other tools for the next time the Staff Planner is accessed.

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 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 - 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 Name	Department	Max Periods	Max Courses	Max Con Periods	FTE %	Courses	Min Sections	Max Sections	Rooms
Staff, Aaron	Science (11/27/2017) English (10/03/2022)	5	(1)	5	1	1	0	3	1
Staff, Bailey	Mathematics (06/08/2019)	(1)	(1)	(1)	100	1	0	3	0
Staff, Cameron	Mathematics (12/11/2011)	(7)	(7)	6	100	6	0	26	2
Staff, Darlene A	Elective (06/29/2015)	(7)	(7)	(7)	100	6	0	14	0
Staff, Erik	(10/13/2009)	(7)	(7)	(7)	100	2	0	0	0
Staff, Francine	Business/Career (07/05/2011)	(7)	(7)	(7)	100	3	0	13	8
Staff, George W	Foreign Language (12/11/2010)	(7)	(7)	(7)	100	4	0	12	0
Staff, Heather	Business/Career (06/29/2017) (12/31/2018)	(7)	(7)	(7)	100	1	0	5	5
Staff, Isaac	Business/Career (06/12/2019)								

Print

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.

Staff Name	Department	Max Periods	Max Courses	Max Con Periods	FTE %	Courses	Min Sections	Max Sections	Rooms
Staff, Brian	Social Studies (09/07/2010)	(11)	(11)	(11)		0	0	0	0
Staff, Carmen	Science (09/07/2010)	(11)	(11)	(11)	100	0	0	0	0

More Scheduling Tools
Course Planner
Scheduling Board

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.

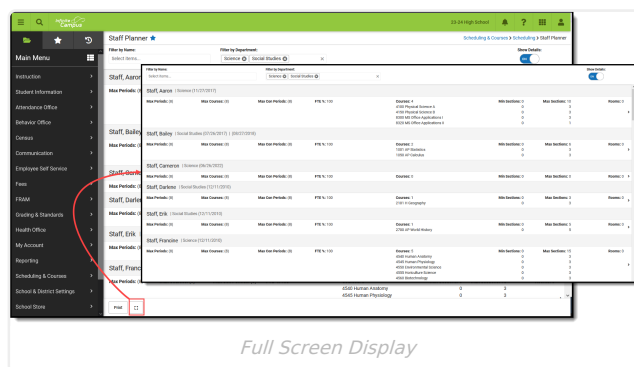
A .csv export of the Staff Planner grid can be generated by clicking the **Print** button. It lists the same information that displays in the grid, but in spreadsheet format.

Staff Name	Department	Max Periods	Max Courses	Max Con Periods	FTE %	Courses	Min Sections	Max Sections	Rooms
Staff, Aaron	Science (11/27/2017)	5	(1)	5	1	1	0	3	1
Staff, Bailey	Mathematics (06/08/2019)	(1)	(1)	(1)	100	1	0	3	0
Staff, Cameron	Mathematics (12/11/2011)	(7)	(7)	6	100	6	0	26	2
Staff, Darlene A	Elective (06/29/2015)	(7)	(7)	(7)	100	6	0	14	0
Staff, Erik	(10/13/2009)	(7)	(7)	(7)	100	2	0	0	0
Staff, Francine	Business/Career (07/05/2011)	(7)	(7)	(7)	100	3	0	13	8
Staff, George W	Foreign Language (12/11/2010)	(7)	(7)	(7)	100	4	0	12	0
Staff, Heather	Business/Career (06/29/2017) (12/31/2018)	(7)	(7)	(7)	100	1	0	5	5
Staff, Isaac	Business/Career (06/12/2019)								

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.



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.

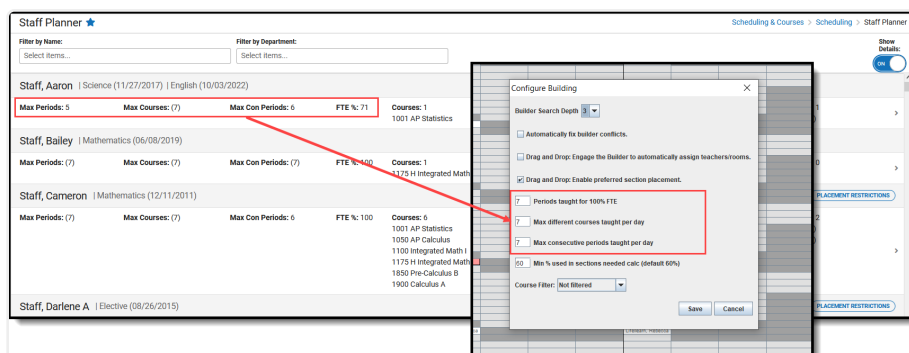
Filter by Name: Select items...		Filter by Department: Science Social Studies		Show Details: 	
Staff, Aaron Science (11/27/2017)					
Max Periods: (8)	Max Courses: (8)	Max Con Periods: (8)	FTE %: 100	Courses: 4 4100 Physical Science A 4150 Physical Science B 8300 MS Office Applications I 8320 MS Office Applications II	Min Sections: 0 0 0 0 1 Max Sections: 10 3 3 3 7 Rooms: 0 »
Staff, Bailey Social Studies (07/26/2017) (08/27/2018)					
Max Periods: (8)	Max Courses: (8)	Max Con Periods: (8)	FTE %: 100	Courses: 2 1001 AP Statistics 1050 AP Calculus	Min Sections: 0 0 0 Max Sections: 6 3 3 Rooms: 0 »
Staff, Cameron Science (06/26/2022)					
Max Periods: (8)	Max Courses: (8)	Max Con Periods: (8)	FTE %: 100	Courses: 0	Min Sections: 0 Max Sections: 0 Rooms: 0 »
Staff, Darlene Social Studies (12/11/2010)					
Max Periods: (8)	Max Courses: (8)	Max Con Periods: (8)	FTE %: 100	Courses: 1 2101 H Geography	Min Sections: 0 0 Max Sections: 3 3 Rooms: 0 »
Staff, Erik Social Studies (12/11/2010)					
Max Periods: (8)	Max Courses: (8)	Max Con Periods: (8)	FTE %: 100	Courses: 1 2700 AP World History	Min Sections: 0 0 Max Sections: 5 5 Rooms: 0 »
Staff, Francine Science (12/11/2010)					
Max Periods: (8)	Max Courses: (8)	Max Con Periods: (8)	FTE %: 100	Courses: 5 4540 Human Anatomy 4545 Human Physiology 4550 Environmental Science 4555 Multicultural Science 4560 Biotechnology	Min Sections: 0 0 0 0 0 0 Max Sections: 15 3 3 3 3 3 Rooms: 0 »

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 and Builder Configuration Fields

► [Click here to expand...](#)

Fields	Description	Builder Configuration Field
Max Periods	Maximum number of periods the teacher can teach during the day.	Periods Taught for 100% FTE defaults to this number, but can be modified
Max Courses	Maximum number of courses the teacher can teach during the day.	Maximum Different Courses Taught per Day
Max Consecutive Periods	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
FTE	<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> <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>	Max Periods divided by the default value of Periods Taught for 100% (whatever shows in parens)
Courses	Number of courses that are currently assigned to the teacher.	N/A
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. On the left, a list of staff members is displayed: Staff, Aaron | Science (11/27/2017) | English (10/03/2022), Staff, Bailey | Mathematics (06/08/2019), Staff, Cameron | Mathematics (12/11/2011), and Staff, Darlene A. | Elective (08/26/2015). The right panel shows the detailed view for 'Staff, Aaron | Science, English'. It includes fields for 'Max Periods: 5', 'Max Courses: (7)', and 'Max Con Periods: 6'. Below these are sections for 'Courses & Rooms' and 'Placement Restrictions'. The 'Courses & Rooms' section has a table with columns for 'COURSE', 'DEPARTMENT', 'MIN', and 'MAX'. The 'Placement Restrictions' section has a table with columns for 'ROOM' and 'PRIORITY'.

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**.

The screenshot shows the 'Staff Planner' interface with the 'Staff, Darlene | Elective' card selected. The card is currently collapsed. A red box highlights the 'Collapse All' button in the top right corner of the card. The card also shows fields for 'Max Periods: (7)', 'Max Courses: (7)', and 'Max Consecutive Periods: (7)'. Below these are sections for 'Courses & Rooms' and 'Placement Restrictions'.

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

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.

The screenshot shows the 'Placement Restrictions' window. It has two filter fields: 'Filter by Term' with '3' selected and 'Filter by Period Schedule' with 'Daily' selected. Below the filters is a grid with columns for terms (3) and rows for periods (0-5). A dropdown menu is open for the 'Daily' filter, showing options: 'Daily', '2 HR Late Start', 'Assembly', and 'Testing'. The grid shows a restriction symbol (a red circle with a diagonal line) in the cell for Term 3, Period 0.

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).

This screenshot shows the 'Placement Restrictions' grid with a restriction symbol (a red circle with a diagonal line) added to the first row (Period 0) across all terms (columns 1-4). The caption below is '1. Period Restriction Across All Terms'.

This screenshot shows the 'Placement Restrictions' grid with a restriction symbol (a red circle with a diagonal line) added to the '2 HR Late Start' column across all periods (rows 1-4). The caption below is '2. Late Start Schedule Restriction'.

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.

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

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.

