

Staff Planner [.2323 - .2327]

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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	Team	FTE %	Courses	Min Sections	Max Sections	Rooms
Staff, Aaron	Social Studies (09/07/2010)	(8)	(8)	(8)	None	100	0	0	0	0
Staff, Bailey	Science (09/07/2010)	(8)	(8)	(8)	None	100	0	0	0	0
Staff, Cameron	Social Studies (08/30/1994)	(8)	(8)	(8)	None	100	0	0	0	0
Staff, Darlene	Social Studies (08/03/2017)	(8)	(8)	(8)	None	100	0	0	0	0
Staff, Elliot	Science (09/07/2010)	(8)	(8)	(8)	None	100	0	0	0	0
Staff, Francine	Science (08/20/2020)	(8)	(8)	(8)	None	100	0	0	0	0
Staff, George	Science (07/01/2014)	(8)	(8)	(8)	None	100	0	0	0	0
Staff, Heather J	Social Studies (03/09/2015)	(8)	(8)	(8)	None	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.

User Tool Rights Editor

Search Campus Tools
scheduling

Tool Rights	
▶ Instruction	<input type="radio"/> All
▶ Student Information	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
▶ Attendance Office	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
▶ Behavior Office	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
▶ Census	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
▶ Communication	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
▶ Employee Self Service	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
▶ Fees	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
▶ FRAM	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
▶ Grading & Standards	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
▶ Health Office	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
▶ My Account	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
▶ Reporting	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
▼ Scheduling & Courses	
▼ Scheduling	
Scheduling Center	<input type="radio"/> All
Course Planner	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
Scheduling Board	<input type="radio"/> All <input type="radio"/> Read <input type="radio"/> Write <input type="radio"/> Add <input type="radio"/> Delete
Staff Planner	<input type="radio"/> All <input checked="" type="checkbox"/> Read <input checked="" type="checkbox"/> Write <input type="checkbox"/> Add <input type="checkbox"/> Delete

Staff Planner Tool Rights

Users who were assigned ANY tool rights to the Schedule Wizard, full tool rights (RW) have been assigned to Staff Planner.

Users who were NOT assigned tool rights to Schedule Wizard have not been assigned any tool rights to Staff Planner.

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

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

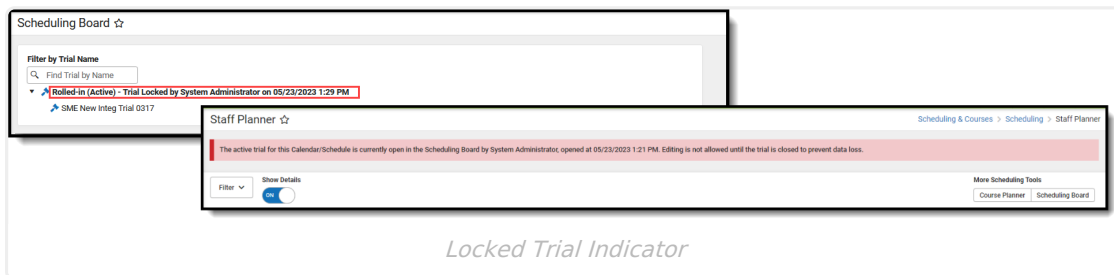
A **Year**, **School** and **Calendar** (and **Structure** when applicable) **MUST** be selected in the Campus toolbar in order to display information.

Locked Trial

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

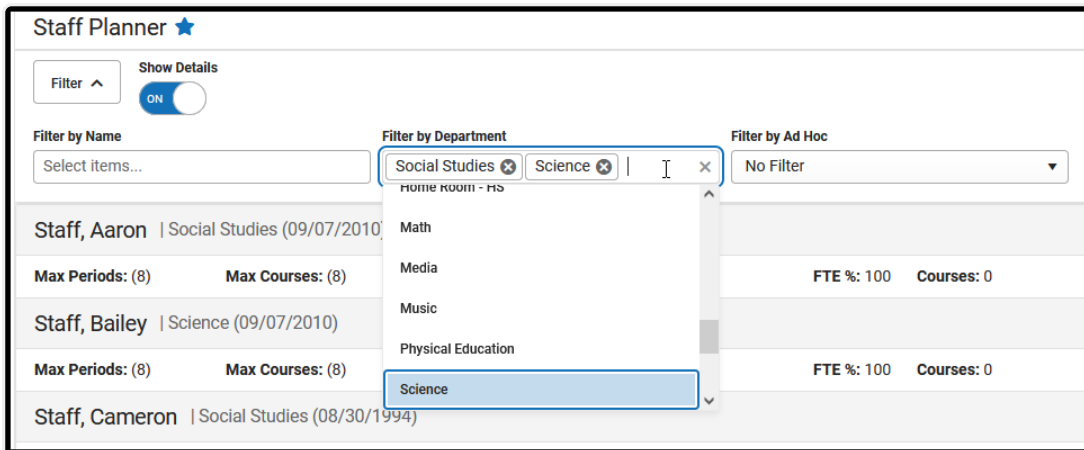
Changes made in Staff Planner in a locked trial cannot be saved.

NEED A SENTENCE AS TO WHY THIS IS IMPORTANT. WILL THEIR CHANGES NOT BE VISIBLE IN SCHED BOARD UNTIL IT IS NO LONGER LOCKED? IS THIS JUST A NOTE FOR INFO?



Filter Options

Use the **Filter by Name**, **Filter by Department** and **Filter by Ad hoc** options to assign courses and rooms for a particular staff person, for an entire department or for a previously created list (in Filter Designer) of staff. Begin typing in the field by entering a last name, a first name, a letter in a name, the start of a department name, etc. Matching results display and are further refined as more letters are entered. A message displays when no matching results are found.



Staff Planner Filter Options

Click the Filter toggle arrow up or down to show or hide the filter options.

- **Filter by Name.** When a staff person is selected here, only that person's information displays. This is helpful when the staff person has specific constraints for their course schedule, maybe the prep period needs to be at a certain time or their courses can only meet in a particular room. Choose the staff person by expanding the dropdown list or by typing the first or last name of the staff person.
- **Filter by Department.** Multiple departments can be selected at one time. Only those staff who are assigned to a particular department are listed. This allows planning for ALL staff members for English or Science, for example. [Departments](#) must be created (System Administration > Resources > Resources > Departments) and Departments must be assigned to the staff person's [District Assignment](#) (Census > People > District Assignments).
- **Filter by Ad hoc.** Filters created in Filter Designer using the Data Type of Census/Staff are available for selection. Any staff person who included in the selected filter and who has an active employment record in the selected school and calendar display.

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

For staff who are assigned to multiple departments in the same school, the departments are listed by the start date of the District Assignment, with the earliest start date first. In the following image, the teacher Aaron Staff has two District Assignments for the same high school - one for Science with a start date of 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

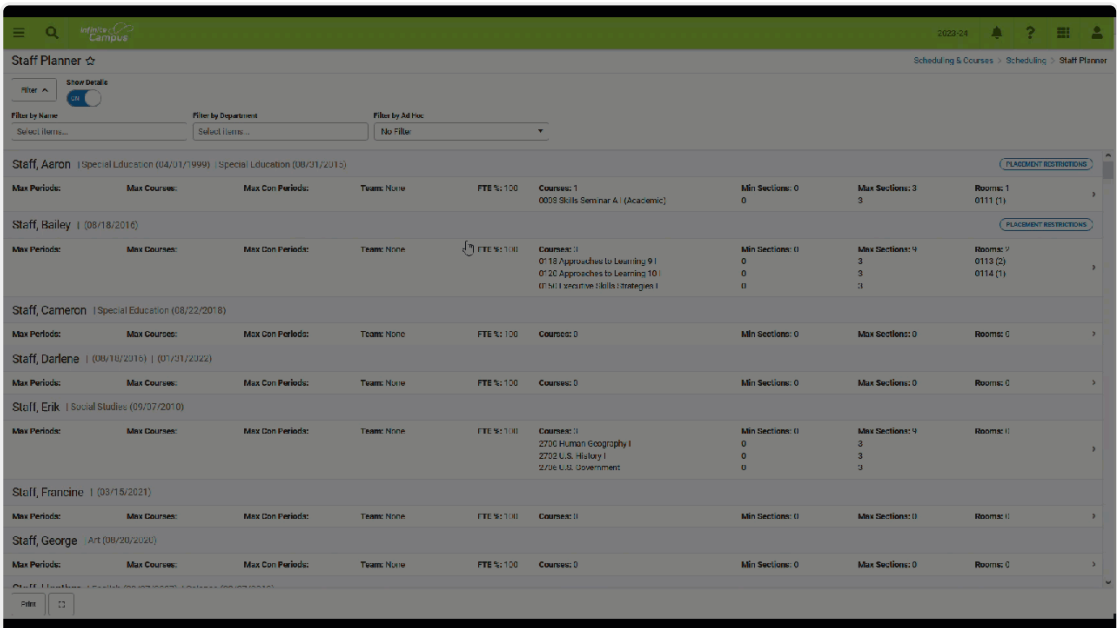
Since the Department assignment is optional, teachers who are not assigned to a department are listed in alphabetical order by name with the start date of their District Assignment in parentheses.

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.

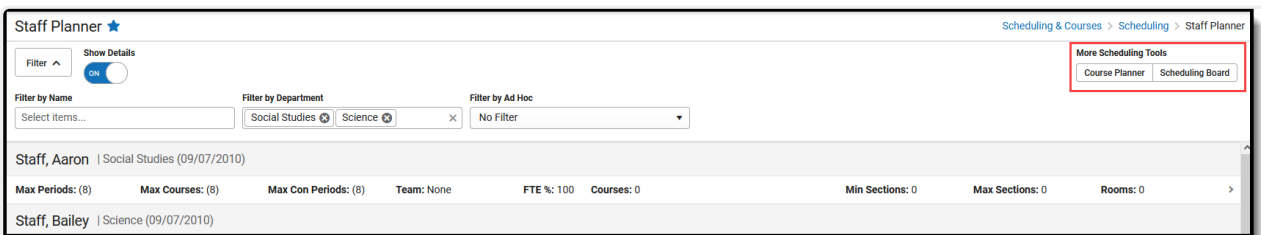


Staff Planner Display Options

More Scheduling Tools

Access the **Course Planner** and the **Scheduling Board** from the Staff Planner by clicking either of the options in the upper right corner.

This ONLY displays when navigating to the Staff Planner FROM the Scheduling Board. When opening Staff Planner from the index, More Scheduling Tools DOES NOT display.

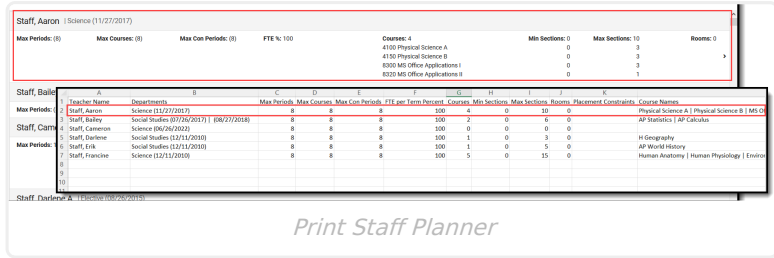


Access to Course Planner and Scheduling Board

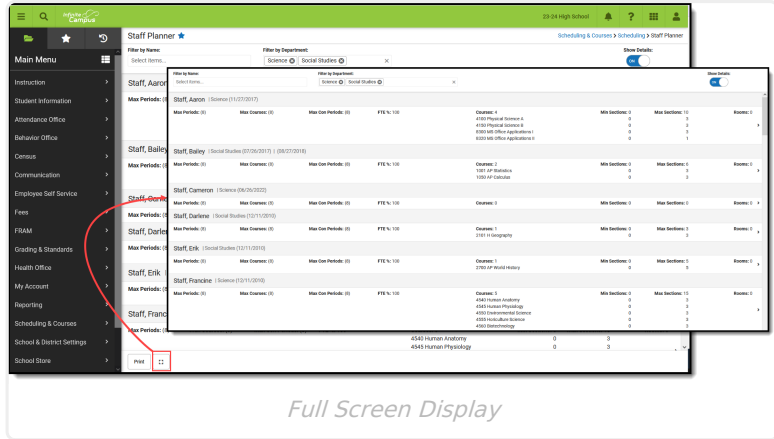
Action Bar Options

Across the bottom of the Staff Planner is the Action Bar. Available is the ability to print staff information and to view the Staff Planner in full screen mode.

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



The Staff Planner can be viewed in full screen if needed. Click the Full Screen button to remove Campus toolbar and tool header, as well as the Campus outline.

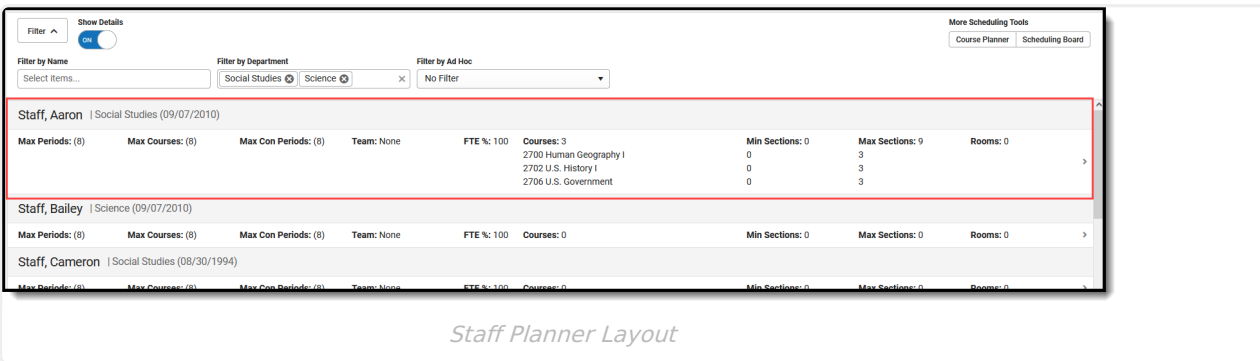


Click the button again or use the ESC key to return to standard view.

Staff Planner Layout

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

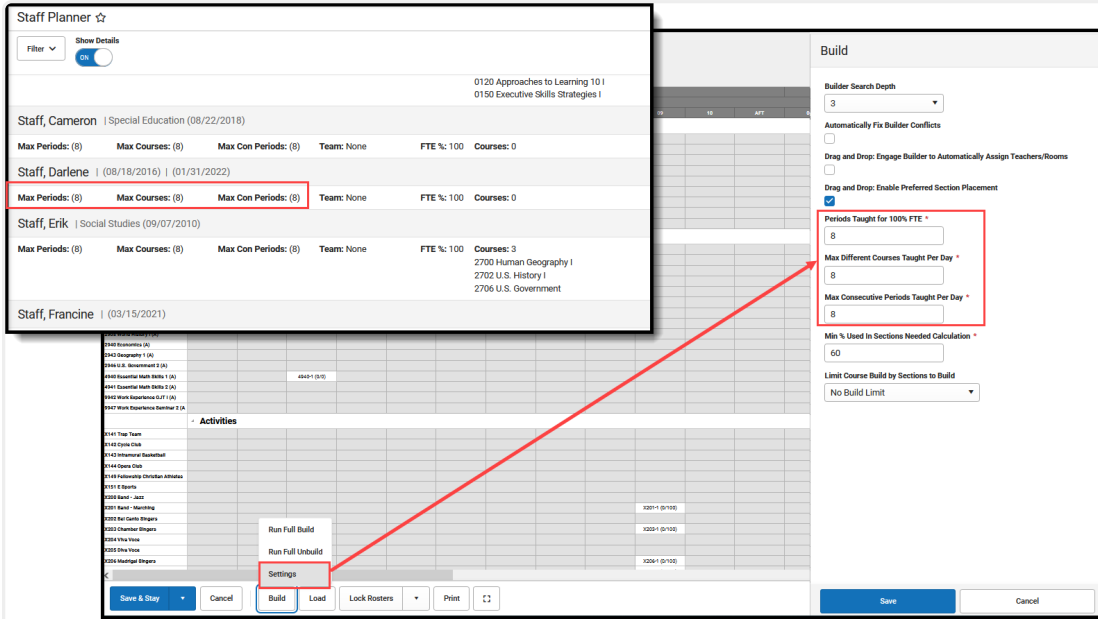
The Staff Planner lists the names of teachers alphabetically who have an active [District Assignment](#) record with the Teacher checkbox marked in the selected school. Dates of the teacher's active district assignment record(s) display behind their name in parentheses.



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 three fields on the Staff Planner are pulled from the [Builder Configuration](#) tool in the Scheduling Board. Default values are noted in the parentheses, but they can be modified in the side panel. Click the **Expand** section below for descriptions of all listed fields.

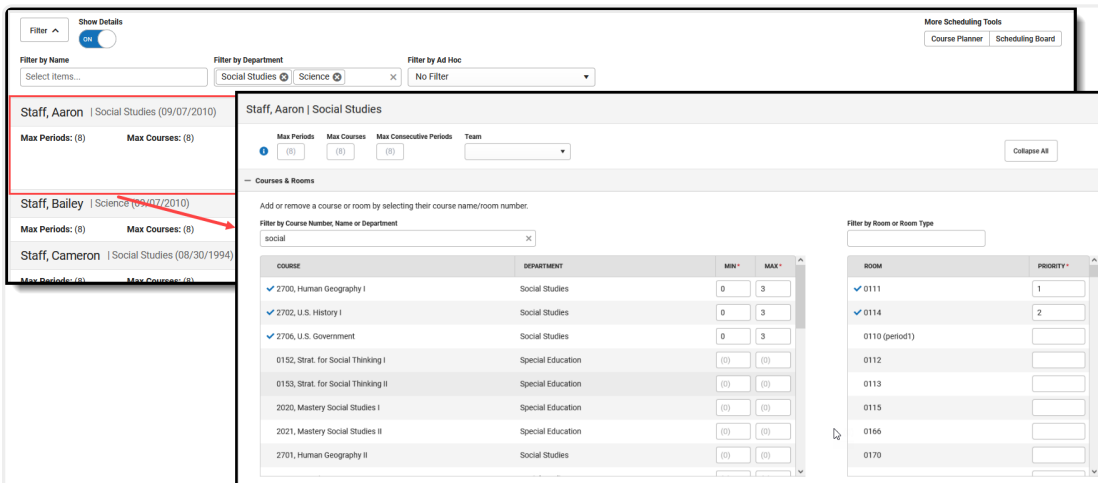


Staff Planner and Builder Configuration Fields

▶ [Click here to expand...](#)

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.



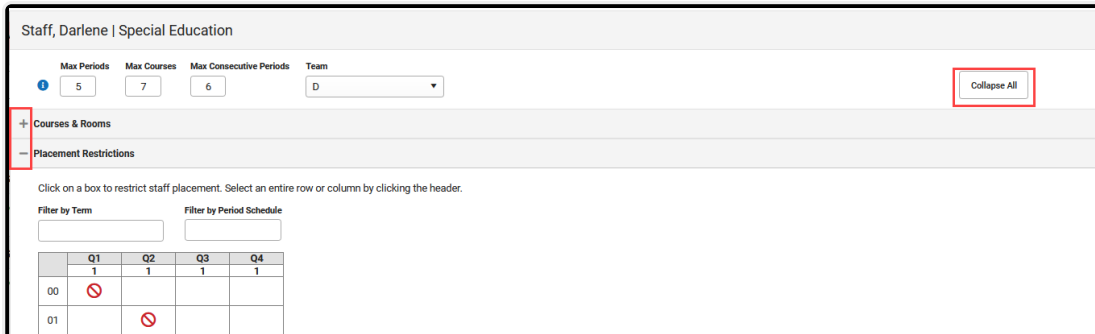
Staff Planner Side Panel

Clicking the headers of the Course Number/Name/Department, Minimum/Maximum, or the Room/Priority tables does nothing.

Collapse or Expand Staff Planner Cards

Use the **Expand All** button to show the detail of the Courses & Rooms card and the Placement

Restrictions card. When adjusting the max periods/courses values for several teachers, it may be easier to leave those cards in their collapsed state. The cards can be expanded one at a time by clicking the plus sign. Once either card is expanded, the Expand All button changes to read **Collapse All**.



Staff, Darlene | Special Education

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

Collapse All

+ Courses & Rooms

- Placement Restrictions

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

Filter by Term: Filter by Period Schedule:

	Q1	Q2	Q3	Q4
00	1	1	1	1
01		1		

Expand or Collapse Staff Planner Cards

When saving information on the side panel, there are three options:

- **Save & Next.** Saves the modified data on the selected teacher and then moves to the next teacher in the list, based on any filtering of staff from the main view. The next staff is also listed in the far right corner of the side panel. Save & Next is the default save option, unless the last course in the list is displayed, in which case Save & Next is not available.
- **Save & Stay.** Saves the modified data on the selected teacher and then remains on that teacher for further updates.
- **Save & Close.** Saves the modified data on the selected teacher and then closes the side panel, displaying the main Staff Planner view.

To not save any changes made in the side panel, click the **Cancel** button.

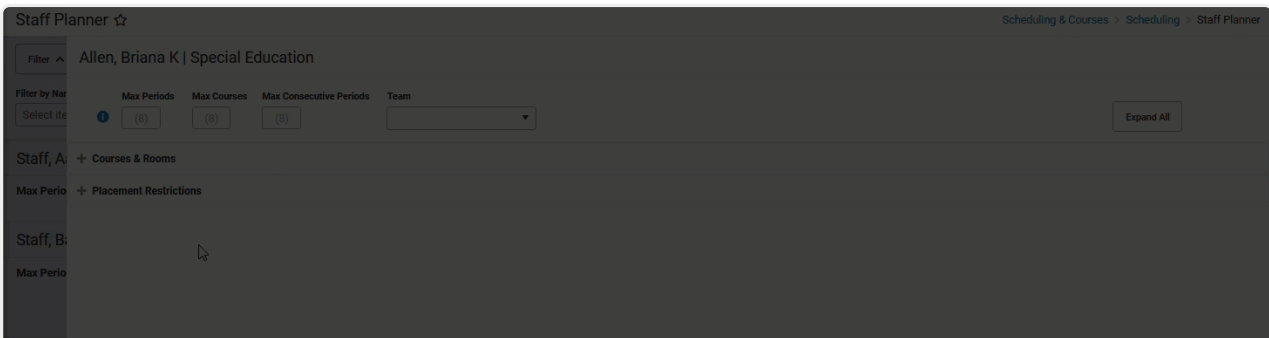
Change Max Periods, Max Courses, Max Consecutive Periods Values

On the Main Staff Planner view, the teacher's current settings of periods, courses and consecutive periods display. Those in parentheses are the default values from the Builder Configuration settings for the active trial; values not in parentheses indicate the original value has been adjusted in the Staff Planner.

Staff, Aaron Special Education (08/31/2015)						
Max Periods: 5	Max Courses: 7	Max Con Periods: 6	Team: D	FTE %: 100	Courses: 1 0003 Skills Seminar A I (Academic)	
Staff, Bailey (08/18/2016)						
Max Periods: 7	Max Courses: 7	Max Con Periods: 7	Team: None	FTE %: 100	Courses: 3 0118 Approaches to Learning 9 I Approaches to Learning 10 I Executive Skills Strategies I	
Staff, Cameron Special Education (08/22/2018)						
Max Periods: (8)	Max Courses: (8)	Max Con Periods: (8)	Team: None	FTE %: 100	Courses: 0	
Staff, Darlene (08/18/2016) (01/31/2022)						
Max Periods: (8)	Max Courses: (8)	Max Con Periods: (8)	Team: None	FTE %: 100	Courses: 0	

Staff Planner Adjusted Values vs. Default Values

1. Open the side panel by clicking in the row or clicking the caret on the far right side of the row for the appropriate teacher.
2. Enter the appropriate values for the selected teacher for **Max Periods, Max Course, Max Consecutive Periods** by typing in the field.
3. If this is the only update that needs to be made, click the **Save & Next, Save & Stay** or **Save & Close** button. Otherwise, continue making adjustments for this selected staff person.



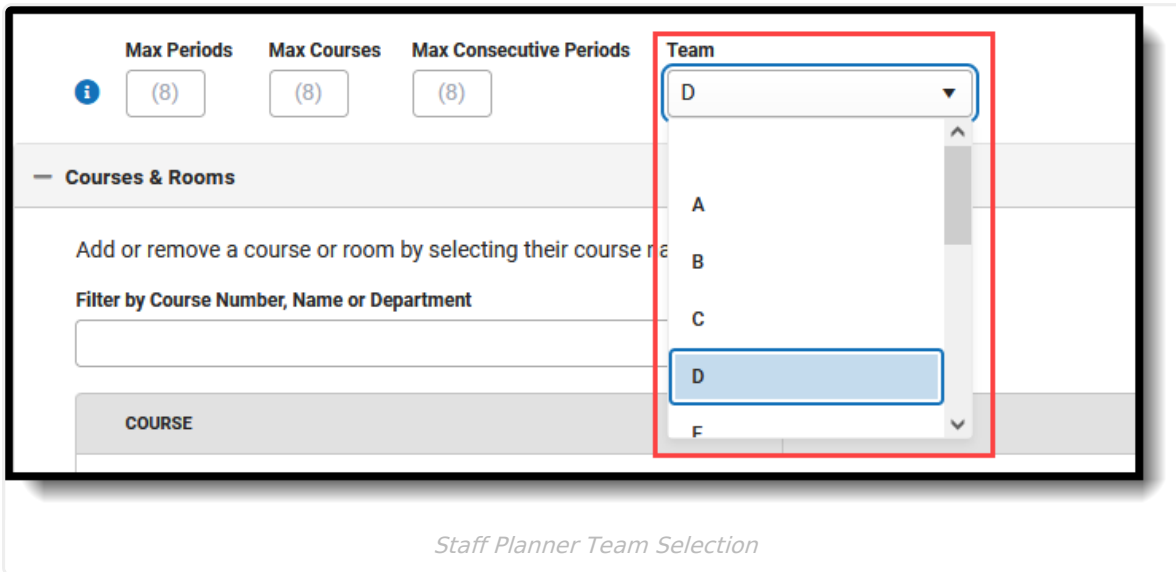
Adjusting Max Periods, Courses, Consecutive Periods Values

Team Selection

Teams (Scheduling Groups) are assigned to a Course Section. A Team can be selected from the dropdown on the Staff Planner Side Panel. This team selection is then pushed to the Course Section when the course is built in the Scheduling Board.

Scheduling Groups must be available in the selected calendar to assign them to a staff person.

Select the appropriate team from the dropdown. Click one of the save options when finished.



On the main view of the Staff Planner, use the Team Filter Option to display only those staff who have been assigned to the selected Team.

The Team assigned here also displays in the Scheduling Board on the Section Side Panel.

Course and Room Selection

The Courses & Rooms card lists all active courses in the selected calendar and a list of all AVAILABLE rooms displays. 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.

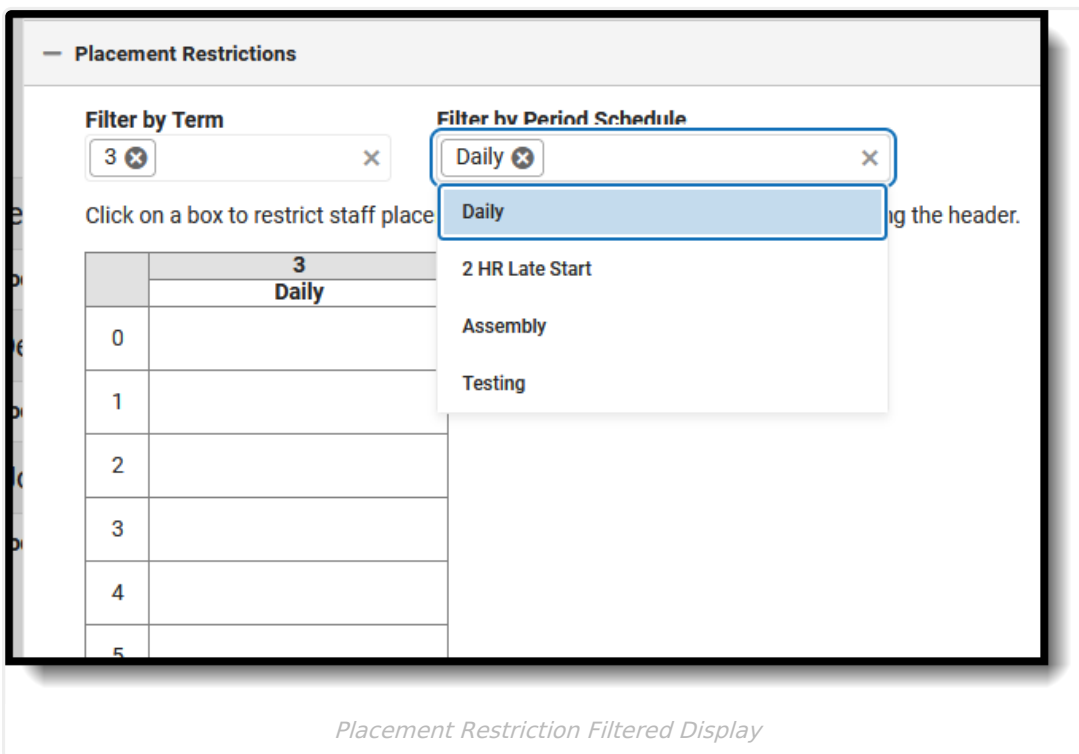
Assign Rooms to Selected Teachers


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.



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).

Placement Restrictions

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

Filter by Term Filter by Period Schedule

	1				2				3				4			
	Daily	2 HR La...	Assembly	Testing	Daily	2 HR La...	Assembly	Testing	Daily	2 HR La...	Assembly	Testing	Daily	2 HR La...	Assembly	Testing
0																
1	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘
3																
4																
5																
6																
7																
8																
ACT																

1. Period Restriction

Placement Restrictions

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

Filter by Term Filter by Period Schedule

	1				2				3				4			
	Daily	2 HR La...	Assembly	Testing	Daily	2 HR La...	Assembly	Testing	Daily	2 HR La...	Assembly	Testing	Daily	2 HR La...	Assembly	Testing
0																
1					⊘											
2					⊘											
3					⊘											
4					⊘											
5					⊘											
6					⊘											
7					⊘											
8					⊘											
ACT																

2. Late Start Schedule Restriction

Placement Restrictions

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

Filter by Term Filter by Period Schedule

	1				2				3				4			
	Daily	2 HR La...	Assembly	Testing	Daily	2 HR La...	Assembly	Testing	Daily	2 HR La...	Assembly	Testing	Daily	2 HR La...	Assembly	Testing
0									⊘							
1									⊘	⊘	⊘	⊘				
2									⊘	⊘	⊘	⊘				
3									⊘	⊘	⊘	⊘				
4									⊘	⊘	⊘					
5									⊘	⊘	⊘					
6									⊘	⊘	⊘					
7									⊘	⊘	⊘					
8										⊘						
ACT									⊘							

3. Term Restriction

Placement Restrictions

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

Filter by Term:

Filter by Period Schedule:

	1				2				3				4			
	Daily	2 HR La...	Assembly	Testing	Daily	2 HR La...	Assembly	Testing	Daily	2 HR La...	Assembly	Testing	Daily	2 HR La...	Assembly	Testing
0																
1																
2																
3																
4																
5																
6																
7																
8																
ACT																

4. Single Period Restriction

To remove the symbol, click in that cell again.

Restrictions are added for any period schedule or term that is not displayed due to filtering by term or schedule. When saved, a validation message displays to alert the user that changes were made to hidden terms/period schedules.

Placement Restrictions

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

Filter by Term:

Filter by Period Schedule:

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

Warning x

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

Don't show again.

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 >

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.
- Use the Course Planner to compare student request and course sections to ensure the correct number of course sections is available for scheduling.
- Generate [scheduling reports](#) to review the placement of courses.
- When all scheduling items have been completed, mark the [Scheduling Board Trial](#) active.