

Filters and Quick Reports for Scheduling

The Surrey team has developed a set of filters, field sets and quick reports in build view to assist our schedulers with finding:

1. Students Course Requests with Designations
2. Course Request Tally with Designation
3. Class size and composition
4. Combined section totals report

We are including, as additional information, the training document we sent to our school scheduling teams (Scheduling – Class Size and Composition).

Please feel free to use this resource or pass it on to others if you find it helpful. If you have any questions regarding the tools please feel free to contact Quirina Gamblen at gamblen_q@surreyschools.ca

Course Requests for Designated Students

Build View > Global top tab > Requests side tab

We created a field set that included the 1701 Ministry Designation field on this screen.

We also built a query (saved as a filter) that is used to call up all course requests for students with a designation of A-H so that we are able to mass update their requests to 'inclusion':

SD36 A-H Designations Advanced Mode

Tables: Student Course Request

Fields: Section type, Is inclusion section?, Content term code, Section number, Term code, Is alternate course?

Operator: Equals

Value Source: Constant

Value: []

Prompt for value: []

Search criteria

- Student > 1701 Ministry Designation Is not empty null
- And Student > 1701 Ministry Designation Does not contain K
- And Student > 1701 Ministry Designation Does not contain P
- And Student > 1701 Ministry Designation Does not contain Q
- And Student > 1701 Ministry Designation Does not contain R

Search based on: Primary Requests

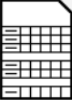
Buttons: Search, Cancel, + New, Save, Select...

Callout: These are the designations that do not impact composition in Surrey. If your language is different you will need to reconsider the query.

We built the following quick report for Course Requests by Course with Designation which tallies the designation information at the bottom of each course request list:

Build View > Global top tab > Requests side tab > Reports > Quick Report

Quick Report: Report Type Step 2 of 8

Report type: 

Description: This is a list format with groupings. You can include page breaks as well as calculate totals by group. Use it to print a homeroom or bus list, for example.

Group Selection

Available Fields A Z

- Section type
- Is inclusion section?
- Content term code
- Section number
- Term code
- Is alternate course?
- Is optional?
- Alternate course priority
- Alternate course type
- Needs approval?
- Course Type
- How Taken

Selected Fields

- School Course > Number
- Section type
- Term code
- Course Type

Quick Report: Field Selection Step 3 of 8

Available Fields A Z

- Section type
- Is inclusion section?
- Content term code
- Section number
- Term code
- Is alternate course?
- Is optional?
- Alternate course priority
- Alternate course type
- Needs approval?
- Course Type
- How Taken

Selected Fields

- Student > Name
- Student > Pupil #
- Student > Gender
- Student > Grade level
- Student > Date of birth
- Student > 1701 Ministry De
- Is inclusion section?
- Is alternate course?

Quick Report: Sort Order

Step 4 of 8

Primary sort fields (Group by) Number , Section type , Term code , Course Type

Available Fields ↓ A Z

Student Course Reque ▼

- Is inclusion section?
- Content term code
- Section number
- Is alternate course?
- Is optional?
- Alternate course priority
- Alternate course type
- Needs approval?
- How Taken

Add >>

<< Remove

Selected Fields

Student > Name

Up

Down

Change sort

← Previous Next → Finish Cancel

Quick Report: Totals and Statistics

Step 5 of 8

Totals

| Group | Total Count | Page Break |
|------------------------|-------------------------------------|-------------------------------------|
| Overall | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| School Course > Number | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Section type | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Term code | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Course Type | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Statistics

Student > Name ▼ + Add

| Field | Function | Reset By |
|-------------------------------------|----------|---|
| Student > 1701 Ministry Designation | COUNT ▼ | Group:School Course > Number ▼ X |
| Is alternate course? | COUNT ▼ | Group:School Course > Number ▼ X |

← Previous Next → Finish Cancel

SD36 Course Requests by Course w Designation
06/04/2017

| SchoolCourse > CrsNo: MCAFT11--S; SecType: ; TermCode: ; Course Type: | | | | | | | |
|---|-------------------|------------------|-----------------|---------------|-----------------------|------------|------------|
| Student > Name | Student > Pupil # | Student > Gender | Student > Grade | Student > DOB | Student > Designation | Inclusion? | Alternate? |
| | | M | 11 | | | N | N |
| | | F | 10 | | | N | N |
| | | F | 11 | | D | N | N |
| | | F | 09 | | | N | N |
| | | F | 10 | | | N | N |
| | | F | 10 | | | N | N |
| | | F | 10 | | | N | N |
| | | M | 11 | | Q | N | N |
| | | M | 10 | | D | N | N |
| | | M | 10 | | | N | N |
| | | M | 11 | | | N | N |
| | | M | 10 | | | N | N |
| | | M | 10 | | Q | N | N |

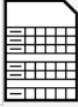
| Summary SchoolCourse > CrsNo: MCAFT11--S | | |
|--|----------------------------------|----|
| Totals | Alternate?: N | 13 |
| | Student > Designation:D | 2 |
| | Student > Designation:Q | 2 |
| | SchoolCourse > CrsNo: MCAFT11--S | 13 |

Class Lists with Designation

We built the following Quick Report to of class lists with designations which tallies at the bottom:


Build View > Workspace top tab > Schedules side tab > Reports > Quick Report

Quick Report: Report Type Step 2 of 8

Report type: 

Description: This is a list format with groupings. You can include page breaks as well as calculate totals by group. Use it to print a homeroom or bus list, for example.

Group Selection


Available Fields: 

- Schedule term
- Content term code
- Schedule
- Lock schedule
- Inclusion?
- Term map
- Schedule matrix

Selected Fields:

- Schedule term
- Schedule
- Build Master Schedule > T
- Build Master Schedule > C

Quick Report: Field Selection Step 3 of 8

Available Fields: 

- Schedule term
- Content term code
- Schedule
- Lock schedule
- Inclusion?
- Term map
- Schedule matrix

Selected Fields:

- Student > Name
- Student > Pupil #
- Student > Gender
- Student > Grade level
- Student > Date of birth
- Student > 1701 Ministry De

Quick Report: Sort Order

Step 4 of 8

Primary sort fields (Group by) Schedule term , Schedule , Teacher , Course

Available Fields ↓ ↕

Schedule Build Studen ▾

- Content term code
- Lock schedule
- Inclusion?
- Term map
- Schedule matrix

Add >>

<< Remove

Selected Fields

Student > Name

▲ Up
 ▼ Down
 Change sort

← Previous
Next →
🚩 Finish
✕ Cancel

Quick Report: Totals and Statistics

Step 5 of 8

Totals

| Group | Total Count | Page Break |
|---------------------------------|-------------------------------------|-------------------------------------|
| Overall | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Schedule term | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Schedule | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Build Master Schedule > Teacher | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Build Master Schedule > Course | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Statistics

Student > Name
+ Add

| Field | Function | Reset By |
|-------------------------------------|----------|--|
| Student > 1701 Ministry Designation | COUNT ▾ | Group:Build Master Schedule > Course ▾ |

✕

← Previous
Next →
🚩 Finish
✕ Cancel

School level - Class Size Composition

06/04/2017

| Term: S1; Schedule: 1(1-2); Teacher: ; Course: MEN--10--S-SLC-04 | | | | | |
|--|-------------------|------------------|-----------------|---------------|-----------------------|
| Student > Name | Student > Pupil # | Student > Gender | Student > Grade | Student > DOB | Student > Designation |
| | | M | 09 | | |
| | | F | 09 | | |
| | | M | 09 | | |
| | | M | 09 | | |
| | | F | 09 | | |
| | | F | 09 | | |
| | | F | 09 | | |
| | | M | 09 | | |
| | | M | 09 | | Q |
| | | M | 11 | | D |
| | | M | 09 | | |
| | | F | 10 | | G |
| | | M | 09 | | Q |
| | | M | 09 | | |
| | | M | 09 | | |
| | | M | 10 | | |
| | | M | 09 | | |
| | | M | 09 | | |
| | | M | 11 | | |
| | | M | 09 | | G |
| | | M | 09 | | |
| | | F | 09 | | |
| | | M | 09 | | |
| | | F | 09 | | |
| | | M | 09 | | |

| Summary Term: S1; Schedule: 1(1-2); Teacher: ; Course: MEN--10--S-SLC-04 | | |
|--|---------------------------|----|
| Totals | Student > Designation:D | 1 |
| | Student > Designation:G | 2 |
| | Student > Designation:Q | 2 |
| | Course: MEN--10--S-SLC-04 | 25 |

Combined Class Totals Quick Report

Build view > **Workspace** top tab > **Master** side tab > **Sections** sub side tab

We built the following Query to call up only sections that are combined (note: this field of Build Class>Identifier can also be brought into a field set to easily see which sections are combined in the Master Schedule)

SD36 Sections Combined Advanced Mode

Tables: Schedule Build Master

Fields: Section number, Team, House, Platoon, Room status, Schedule Rotation

Operator: Equals

Value Source: Constant

Value: [Empty]

Prompt for value:

Search criteria: Build Class > Identifier Is not empty null

Search based on: All Sections

Buttons: Search, Cancel, + New, Save, Select...

And then this Quick Report displays the combined totals of each of the combined sections:

Build View > **Workspace** top tab > **Master** side tab > **Sections** sub side tab > filter: **SD36 Sections Combined** > **Reports** > **Quick Reports**

Quick Report: Report Type

Step 2 of 8

Report type: Group

Description: This is a list format with groupings. You can include page breaks as well as calculate totals by group. Use it to print a homeroom or bus list, for example.

Group Selection

Available Fields: Schedule Build Master, Section number, Team, House, Platoon, Room status, Schedule Rotation, Section type, Is inclusion section?, Team schedule mode, House schedule mode, Section type schedule r, Platoon schedule mode, Content term codes, Enrollment total, Enrollment maximum

Selected Fields: Build Class > Identifier, Build Class > Maximum en, Teacher

Buttons: Add >>, << Remove, Up, Down, Change sort, Previous, Next, Finish, Cancel

Quick Report: Field Selection

Step 3 of 8

Available Fields ↓ A Z

Schedule Build Master ▾

- Section number
- Team
- House
- Platoon
- Room status
- Schedule Rotation
- Section type
- Is inclusion section?
- Team schedule mode
- House schedule mode
- Section type schedule r
- Platoon schedule mode
- Content term codes
- Enrollment total
- Enrollment maximum

Add >>

<< Remove

Selected Fields

- Course
- Section number
- Teacher
- Build Class > Identifier
- Schedule Term > Code
- Description
- Schedule term
- School Room > Number
- Enrollment total

Up

Down

← Previous

Next →

Finish

Cancel

Quick Report: Sort Order

Step 4 of 8

Primary sort fields
(Group by) Identifier , Maximum enrollment , Teacher

Available Fields ↓ A Z

Schedule Build Master ▾

- Section number
- Team
- House
- Platoon
- Room status
- Schedule Rotation
- Section type
- Is inclusion section?
- Team schedule mode
- House schedule mode
- Section type schedule r
- Platoon schedule mode
- Content term codes
- Enrollment total
- Enrollment maximum

Add >>

<< Remove

Selected Fields

- Course

Up

Down

Change sort

← Previous

Next →

Finish

Cancel

Quick Report: Totals and Statistics

Step 5 of 8

Totals

| Group | Total Count | Page Break |
|----------------------------------|-------------------------------------|-------------------------------------|
| Overall | <input type="checkbox"/> | <input type="checkbox"/> |
| Build Class > Identifier | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Build Class > Maximum enrollment | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Teacher | <input type="checkbox"/> | <input type="checkbox"/> |

Statistics

Course

Field

SD36 Combined Class Totals

07/04/2017

| BuildClass > ID: AFT11/12--02; BuildClass > Max: 30; Teacher: | | | | | | | | |
|---|-------|---------|-----------------|---------------------|--------------------|------|-------------------|-------|
| Course | SecNo | Teacher | BuildClass > ID | ScheduleTerm > Code | Description | Term | PrimaryRoom > Num | Total |
| MAF--11--S-02 | 02 | | AFT11/12--02 | S2 | ART FOUNDATIONS 11 | S2 | 101 | 15 |
| MAF--12--S-01 | 01 | | AFT11/12--02 | S2 | ART FOUNDATIONS 12 | S2 | 101 | 15 |

| Summary BuildClass > ID: AFT11/12--02; BuildClass > Max: 30 | | |
|---|----------------------|---|
| Totals | BuildClass > Max: 30 | 2 |

| Summary BuildClass > ID: AFT11/12--02 | | |
|---------------------------------------|-------------------------------|----|
| Totals | BuildClass > ID: AFT11/12--02 | 2 |
| Statistics | Sum Total | 30 |