

Cohort Scheduling Secondary Schools

August 18, 2020







Version History

Version	Date	Description
1.0	6-Aug-2020	Initial document creation
1.1	12-Aug-2020	Added section 2.2.6 Review Student Schedules.
1.2	18-Aug-2020	Added section 2.2.7 Student Group Analysis report

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Table of Contents

1.0 Intro	oduction	4
2.0 Wor	rking in Build view After End of Year Rollover (EOYR)	4
2.1 C	reate a New Scenario	4
2.1.1	How to Copy a Scenario	4
2.1.2	Setting Shared Preferences	5
2.2 Id	lentifying Cohort groups of Students	7
2.2.1	Course Requests	7
2.2.2	Conflict Matrix	8
2.2.3	Course Conflict Analysis - Report	11
2.2.4	Filter Requests	12
2.2.5	Filter Students	14
2.2.6	Review Student Schedules	15
2.2.7	Student Grouping Analysis – Report	16
2.3 M	lodifying the Scenario Structure	18
2.3.1	Adjusting Terms	18
2.3.2	Adjusting Days	20
2.3.3	Adjusting Periods	21
2.4 M	Iodifying Course Section Schedule Information	22
2.4.1	Adding and Deleting Course Sections	22
2.4.2	Manually scheduling sections of courses	24
2.5 S	cheduling Students	24
2.5.1	Class Roster	24
2.5.2	Using Platoons, Teams and/or Houses	





1.0 Introduction

The purpose of this guide is to assist Secondary schools with re-scheduling course sections and students, after a master schedule has been completed. It is a condensed version of the 10 scheduling modules, which should be followed when initially creating a master schedule and loading students. This guide will walk participants through key components to consider a logical order in which steps should be completed and how to perform the required actions.

The guide is based on moving from a Full Year (linear), Semester and Quarterly master schedule to strictly Quarterly. Even if this is not the exact model of your current master schedule or the structure you are moving to, the topics and steps are relevant for all schools, regardless of their current structure and what they may be moving towards.

Additionally, this guide is based on a process of manually scheduling course sections into new Terms, Days & Periods, Rooms, with a Teacher and then hand loading students into those course sections. It does not cover the complete steps required (Patterns, Pattern Sets, Course Setup with Cover and Base Terms, Periods per Cycle, applying Pattern Sets, Optional Build and Load attributes or Rules) to have the MyEducation application schedule course sections or load students based on course requests. If a school would like to do this, please follow the information laid out in the 10 scheduling modules.

2.0 Working in Build view After End of Year Rollover (EOYR)

After the EOYR process has been completed, ALL functionality is still available in the Build view. It is not until after a Scenario has been Committed - moving the Scenario from the Build view to the School view to become the Active Schedule - that users will no longer be able to utilize Build view functionality. And even after the Commit process has been completed, it is still possible to move back into the Build view and Re-commit a scenario. If a school wishes to Re-Commit a Scenario please reach out to the Service Desk for assistance, as there can be very significant consequences depending on the amount of work completed in the School view

2.1 Create a New Scenario

It is highly advisable when beginning this process, that schools make a Copy of their latest Scenario they intended to commit and uncheck shared Preferences. By making, a copy of the Scenario schools will have their completed master schedule and student schedules to refer back. By unchecking shared Preferences, the school will not affect their previous work.

2.1.1 How to Copy a Scenario

- 1. From Scenario top tab (tt).
- 2. Click into the last Scenario worked on so the *Details* is highlighted.
- 3. Click Options > Copy Scenario....





- 4. Complete the following fields
 - Enter a *New scenario name* a suggestion is to make this descriptive for example 1-New Model 7Aug
 - Check Master Schedule
 - Uncheck Clear Platoon Codes
 - Check Student Schedules
 - Check *Rules* (you may not be running the Build or Load process, but this will ensure the Rules come forward *if* you so choose to use them later in the process)
 - Check Bell schedule
 - Check Rotation (this will only be present if the school used the Rotate Schedule function)

New scenario name	1-New Model 6Aug
Items to include	
Master schedule	
Clear platoon code	
Student schedules	$\mathbf{\nabla}$
Rules	
Bell schedule	
** Time structure and sch	edule attributes will be copied automatically.
OK Cancel	

5. Click Ok

2.1.2 Setting Shared Preferences

Within the Preferences of a Scenario you have the ability to *Share* different settings you make in this Scenario with others and vice versa. It is advisable, with in this New Model Scenario, that you Uncheck all shared Preferences. This will ensure the work you do in this Scenario (and subsequent copies of this one) are not pushed back to Scenarios you worked on previously.

- 1. Scenario tt >
- 2. Preferences st >
- 3. *Category* (far left of the screen) = *Scenario-advanced*.
- 4. Uncheck:
 - Use shared course attributes





- Use shared room attributes
- Use shared staff attributes
- Use shared student attributes
- Use shared time structures

Pages	Scenario Workspace Courses	Student Staff Rooms Rules Globa	al
Scenarios	s :: USE THIS ONE - Scenario Gra	de 8-12 2020-	I ⊲ ⊲ Q
Details	Options - Reports - Help -		
Preferences	2 Save X Cancel		3 Category: Scenario-advanced
Terms			
Days	Engine processing time (seconds)	0.0	Relax room constraint
Periods	Room look ahead	0.0	
Rotations	Schedule student	3.5	
Bell	Max count for same validation	20	▲ Up
Schedules	Use shared course attributes		Order to relax room constraints
	Use shared room attributes		
	Use shared staff attributes	□ 4	
	Use shared student attributes		· · · · · · · · · · · · · · · · · · ·
	Use shared time structure	0	Add. Remove

5. Click Save





2.2 Identifying Cohort groups of Students

This section covers methods to assist in identify students, whom have similar course requests or have been scheduled together in course sections. *There is no single report, extract or screen to identify cohort groups of students*. Below are some suggested ways within the application that may help.

2.2.1 Course Requests

Please keep in mind, Course request are Global to ALL scenarios, therefore any modifications to these will affect other Scenarios.

From the *Global* top tab (tt) > *Request* side tab (st) all requests for all students, at a school are listed.

By clicking on the column header of *SchoolCourse* > *CrsNo*, the list can be sorted thereby grouping all students whom have chosen the same course. This information can be printed as a Txt or CSV file for further analysis.

Hugh E	loyd Seco el 6Aug	ondary 2020-20)21							Build view 🔻	٠
Pages	Scenario	Workspace	Courses	Student	Staff	Rooms	Rules	Global			
Request	S										
Pattern Library	Option	ns 🗸 🛛 Reports 🗸	Help 🔻	Search	on CrsNo	٩	70	a=z	th 📕	4	
Pattern	< 1	:A2DP-12 Bressanu	tti, 🗸 💈	>			0 0	f 4 Web P	Quick Report	-	
Sets		Name		Grade So	hoolCours	e > CrsNo 🔺	SectNo	s TXT	5 ()		
Requests		Bressanutti, Samour	, · · ·	11 A	2DP-12	3		ACSV	-B Mard (DOO)	IGN PORTFOLIC	0 12
Requests Details		Lococo, Garnett		11 Ai	2DP-12			AR - (ST 2D	11/12) - AP 2-D D	ESIGN PORTFOLIC	0 12
Patch Entr	0	Perverseff, Sejin		11 A	2DP-12			AR - (ST 2D	11/12) - AP 2-D D	ESIGN PORTFOLIC	0 12
Batch Entry		Abdelkarimdaoudara	bi, Jeongjin	12 A(CAL-12			MA - AP CAI	LCULUS AB 12		
Logs		Angirus, Oanamaria		11 A(CAL-12			MA - AP CAI	LCULUS AB 12		
Reference		Antenenthomas, Isat	elolouis	11 AG	CAL-12			MA - AP CAI	LCULUS AB 12		
		Cassorla, Shubo		11 A(CAL-12			MA - AP CA	LCULUS AB 12		





2.2.2 Conflict Matrix

The Conflict Matrix shows a grid of the numbers of students who have requests for the same two courses and therefore be used to start to identify Cohort groups of students.

This number appears at the course intersection. Click it to see a list of students who requested both courses.

You can select what courses to show in the Conflict Matrix, such as by department or grade level. One reason for students being listed in the matrix is if one or both courses have only a single section available. To use the Conflict Matrix:

- 1. Click the *Workspace* tt
- 2. Conflict Matrix st.
- 3. In the *Course(s)* section, select one of the following:
 - Selection
 - Department
 - Grade level
 - Maximum sections

1-New Mode	el 6Aug	1						
Pages	Scenario	Workspace	Courses	Student	Staff	Rooms	Rules	Global
Conflict I	Matrix							
Master	Optic	Reports -	Help 👻					
Matrix View	Printer	Friendly Version		•				
Conflict Matrix Students	Cours	e(s)	Choose a	a filter ∨ a filter	3			
Assignment	s		Selection					
Schedules			Departmen	t				
Feedback			Grade leve Maximum s	ections				
Analysis		S	electa	mer to	pop	ulate co	ourses	s and vi

- 4. Do one of the following:
 - If you selected *Selection, Department* or *Grade level*, use the pick list that appears to select one or more courses, departments or grade levels respectively, and click OK.
 - If you selected *Maximum* sections, enter the number of sections you want to set as the maximum to appear in the Conflict Matrix and click Submit. Only courses with up to this value appear.





5. In this example, I have chosen *Grade level* of 11 and have used the scroll bars to find two courses with the greatest number of requests.

Those two courses are MCH--11 and MPH--11, with 48 requests:

Matrix View	Printer Friendly Version						
Conflict Matrix ^{Students}	Course(s) Grade level	v					
Assignments					2		
Schedules	Course(s)		ST11 JCH11	4D-11	+-11	REC11	CCT11
Feedback			MMI MMI	MNM	MPF	MPF	MSC
Analysis	MACLV11 PE - (AL11/12) - ACTIVE LIVING 11 Number of requests:18	7	1	9	9	9	3
	MCH11 SC - CHEMISTRY 11 Number of requests:66	36	5 4	36	<u>48</u>	40 3	1
	MCMPR11-L1					_	

6. At the intersection of two courses, click the number. This will take you to a list of Students that have chosen both courses:

Pages	Sce	nario	Workspace	Courses	Student	Staff	Rooms	Rules	Global							
Conflict I	/latri	x ::											•	Q	►	
Master		Option	s 🔻 Reports 🔻	Help 👻	Search	on Name	0	70		3 Ih 🚍						
Matrix View		< 1:	Aalam, Genvykar	en 🗸	>			1) of 48 select	ed 🥖	2 Students	requesting cou	irses M	СН11 а	and MPH	11
Conflict Matrix			Name					YOU	•	Schd?	SchdPri	Team		House		
Students	_		Aalam, Genvykare	m				202	2	Y	0					
Assignment	5		Alhuseyin, Davian					202	2	Y	0					
Schedules			Amadiogontijodea	morim, Antero				202	2	Y	0					
Feerlback			Assen, Nguyenhoa	angcan				202	2	Y	0					
TOODDOCK	_		Baiensesilva, The	rign				202	2	Y	0					
Analysis			Postor Marialaina					202	2	v	0					

7. From the *Options* menu a *Snapshot* can be created to be used later when loading students:

Conflict Matr	ix ::					
Master	Options Reports	Help 🗸	Search on Name	Q 7	' 9 🔠 a	ջ լի
Matrix View	Modify List	Mass Update			0 of 48 select	ted 🥖
Conflict	Snapshots				Vaa	0.1.10
Matrix	Query				YOG	Schd?
Fotudents	Show Selected				2022	Y
Assignments	Omit Selected				2022	Y
Schedules	Amadiogontijodea	morim, Antero			2022	Y
	Assen, Nauvenho	angcan			2022	Y

- 8. The Snapshot window opens. Click the New button.
- 9. A new window opens to identify this *Snapshot*:
 - Name: Enter a name;





- *Owner:* Set the owner;
- Save as filter: this will make the Snapshot available to the Owner for future use;
- *Current List*: Select this to save the list of students that have chosen both courses.

1-New Mode	- ,	,			< 1	:2 F's, 2 I's, or 1 F and 1 I 💙 >	•	https://tst02.myeduca	ation.gov.bc.ca/aspen/createRecordSet — 🔲 🗙 o
Pages	Scenario	Workspace	Courses	Stuc	Searc	h on Name	Â	tst02.myeducatio	n.gov.bc.ca/aspen/createRecordSet.do?deploymentl
Conflict	Actrix					Name	N	lame	Gr10 Cohort 1
Connect					۲	2 F's, 2 I's, or 1 F and 1 I - Final Mark - 2016-	0	Wner	Bond, Daniel V
Master					0	2 F's, 2 I's, or 1 F and 1 I - Tri 1 Grade - 2016	s	ave as filter	
	Option	Reports	Help 🔻	S	0	7	M	love to top of my list	•••••••••••••••••••••••••••••••••••••••
Matrix View	< 1	Aalam, Genvykar	ren 🗸	>	0	At least 2 F's or 2 C-'s - Final Mark - 2016-2017			1
Conflict Matrix		Name			0	At least 2 F's or 2 C-'s - Tri 1 Grade - 2016-2017	R	ecords to Include	
▶ Students	_ 0	Aalam, Genvykare	en		0	At least 2 F's or all C-'s - Final Mark - 2016-20		Ourrent List	
Assignment	s	Alhuseyin, Davian			0	At least 2 F's or all C-'s - Tri 1 Grade - 2016-2		O Snapshot C	ombination
Schedules		Amadiogontijodea	morim, Antero		0	Copy of CLARE		Union	▼
Contraducto		Assen, Nguyenho	angcan		0	Copy of INTERNATIONAL 2020		Hrm 03	~
Feedback		Baiensesilva, The	rign		0	Daniel Bond			
Analysis		Baxter, Marjolaine			8 + N	ew 🖒 Copy 💼 Delete		Save X Car	
		Candolfi, Harsima	rjit						
		Dapavo, Sinung			Use	X Cancel	_		

- This Snapshot can be edited later to include or exclude more students. This is done from the Student tt. Select the student you wish to add, click Snapshot st > Options > Add... > a list of Snapshots will appear > select the appropriate one.
- **NOTE:** See Section 2.5.1.1 below for more information on the use of Snapshots.





2.2.3 Course Conflict Analysis - Report

Courses tt > Reports

This report shows how many students have chosen one course listed in the header of each page and the number of *Potential Conflicts* with other courses. This information can be used to further determine potential Cohorts of Students.

Following our example of *MCH--11* and MPH--11, we can see:

- 1. MCH—11 SC-Chemistry 11 at the top;
- 2. And the number 48 of the requests for *MPH--11;*
- 3. We can also see that there are 36 requests for MLTST11

Richmond	I				Course Conflict	Analysi	is		ŀ	lugh Boyc	l Secondary
					MCH11 SC - CHE	MISTRY 11	l i				
Course Number	Course Description	Potential Conflicts	Total Requests	Course Number	Course Description	Potential Conflicts	Total Requests	Course Number	Course Description	Potential Conflicts	Total Requests
ACAL-12	MA - AP CALCULUS AB	1	20	MLST-12	SS - LAW STUDIES 12	13	44	YESFL2A	EL (EN 3) - ELL 3	1	25
MACLV11	PE - (AL11/12) -	10	18	MLTST11	EN - (11)LITERARY	36	40 3	YPSYC2A	SC - BIOPSYCHOLOGY	2	38
MACLV12	PE - (AL11/12) -	1	37	MMUCH11	MU - (Choir) -	4	5				
MASIA12	SS - ASIAN STUDIES:	7	29	MNMD-10IB	EN - (10) NEW MEDIA	2	44				
MATPH12	SC - ANATOMY AND	1	49	MNMD-11	EN - (11) NEW MEDIA	36	54				
MCH11	SC - CHEMISTRY 11	66	66	MPH11	SC - PHYSICS 11	48	60 2				
MCLE-10	BE - CAREER LIFE	1	107	MPH12	SC - PHYSICS 12	2	51				
MCMPR11-	IT - (CP11/12) -	16	23	MPREC11	MA - PRE-CALCULUS	40	70				
MCMPR12-	IT - (CP11/12) -	1	9	MPREC12	MA - PRE-CALCULUS	18	80				
MCUL-11	HE - (BP11/12) -	8	17	MSC10IB	SC - SCIENCE 10	1	76				
MCUL-12	HE - (BP11/12) -	3	40	MSCCT11	SC - SCIENCE FOR	1	13				





2.2.4 Filter Requests

Filter requests provides a means for the user to find students who have requested a particular set of courses and then show if they have another set of courses requested. This feature is useful to identify students with particular combinations of courses.

In the last example we found 48 students who requested *MCH--11* and *MPH--11*. We can use the *Filter Requests* to determine other courses students may have also requested.

Filter requests is accessed from *Global* tt> *Requests* st > *Options* > *Filter Requests...*

1-New Mode	l 6Aug			_									
Pages	Scenari	o Workspace	Courses	Student	Staff	Rooms	Rule	s Global					
Requests													
Pattern Library	Opti	ons 🕶 🛛 Reports 🕶	Help 👻	Search o	on Name	d	70		i ili 🖶				(
Pattern	D	oloto		Accept Re	quest Rec	ommendation	s	0 of 4765 selec	ted 🥔			Prime	ry Requests
Sets	M	odify List		Collapse F	Packages			SchoolCourse	e > Description	Designation	Inclusion?	TermCode	SecType
Requests	0	uerv		Expand Pa	eckages			SC - CHEMIS	TRY 11		N		
Requests	s	napshots		Multi Add.				SC - LIFE SCI	ENCES 11		N		
Certains		now Selected						SS - LAW STU	JDIES 12		N		
Batch Entry		mit Selected						EN - (11) NEW	MEDIA 11B		N		
Logs		Aalam, Genvykarer	n	10 MF	PH11			SC - PHYSICS	3 11		N		
Reference		Aalam, Genvykarer		10 MF	PREC12			MA - PRE-CAL	CULUS 12		N		
		Aalam, Genvykarer	n	10 M	WWK-11			TE - (WoodL2)	- WOODWORK 11 L2		N		
		Abazid, Nattasha		09 M	CLE-10			BE - CAREER	LIFE EDUCATION		N		
		Abazid, Nattasha		09 M0	DRM-10			DR - (Sr) - DR	AMA 10		N		
	0	Abaziri Nattasha		09 M	MD.10B			EN., (10) NEW	(MEDIA (with Composition) :	IOR	N		

The upper block is used to identify the students with All (Intersection) or Any (Union) of a chosen group of courses.

The lower block determines which course request or requests will be displayed for the students identified using the upper block filter.

- 1. Using our previous example of *Gr10 Cohort 1*, select this *Snapshot* in the upper block;
- 2. Select Intersection (All);
- 3. In the lower block enter or *Select* another course(s). In this example I have chosen *MLTST11*;
- 4. Click OK;

Students			
Scheduled Students Only		House Code	
Snapshot	Gr10 Cohort 1 Q X	Team Code	All 🗸
Course List	∠ Select Intersection (All)	Platoon Code	
Courses			
Include Alternates			
Snapshot	٩		
Course Numbers	MLTST11 3		
4			
GK 🗶 Cano	el		





5. We can see there are *31* students from the snapshot that have also chosen *MLTST11*

			5	0 of 31 selected 🥖
Name	Grade	SchoolCourse > CrsNo 🔺	SectNo	SchoolCourse > Description
Alhuseyin, Davian	10	MLTST11		EN - (11)LITERARY STUDIES 11A
Assen, Nguyenhoangcan	10	MLTST11		EN - (11)LITERARY STUDIES 11A
Baiensesilva, Therign	10	MLTST11		EN - (11)LITERARY STUDIES 11A





2.2.5 Filter Students

Student tt > **Options** > **Filter Students**...

Filter students allows the user to find students by grade, homeroom, or house/team/platoon code that have a course or courses with a given schedule status. This can be used to determine how many students have chosen particular courses.

- In the <u>Students</u> upper block, select the criteria of students you want to analyze (e.g. Grade Level = 10);
- 2. In the *Courses* lower block, select the courses from the *Course List*
- 3. Select Intersection (All);
- 4. Select the *Schedule Status = Requested*.
- 5. Click OK

Students		House Code	
Scheduled Students Only		Team Code	
Grade Level	10 ~ 1	Platoon Code	
Homeroom			
Courses		0	3
Course List	MCH11, MPH11, MLTST	11 Select	Intersection (All) 🗸
Schedule Status	Requested ~		_
5 ✓ OK ★ Cance	I		

6. We can see there are *31* students:

6 0 of	31 selected 🥖
Name	Grade
Alhuseyin, Davian	10
Assen, Nguyenhoangcan	10
Baiensesilva, Therign	10
Candolfi, Harsimarjit	10
Dapavo, Sinung	10
Dempfle, Suleka	10





2.2.6 Review Student Schedules

Workspace tt > *Schedules* st

Schedules for all students, in this scenario, can be viewed and printed (TXT or CSV) from this area for further analysis. By sorting on the column header of *Course* (which is actually the courses sections) users can see all student schedules by course sections.

1-New Mode	l 6Aug										.
Pages	Scenario	Workspace	Courses	Student	Staff	Rooms	Rules	Global			
Schedules											
Master	Option	ns 🔻 Reports 🕇	Help 👻	Search	on Course	0	70	a+z	th a	3	
Matrix View	< 1:	ACAL-12-01 Ang	jirus, Oan 🗸	>			0	of 4608 selecte	ed 🥖		
Conflict Matrix		Name				Grade		Course 🔊		Term	Schedule
Assignment	5	Angirus, Oanamar	ia			11		ACAL-12-01		FY	1(3)
		Antenenthomas, Is	sabelolouis			11		ACAL-12-01		FY	1(3)
Details		Defigueiredofilho,	Yongdong			11		ACAL-12-01		FY	1(3)
Feedback		Desaiya, Feier				11		ACAL-12-01		FY	1(3)
TOCUDUCK		Erikson, Ruoxi						ACAL-12-01		FY	1(3)
Analysis		Gaught, Ferahatel	if			11		ACAL-12-01		FY	1(3)
		Halabi, Bofeng				10		ACAL-12-01		FY	1(3)





2.2.7 Student Grouping Analysis – Report

Courses tt > **Reports** > **Student** Grouping Analysis

This report compares student course requests between departments and will identify the number of students who have chosen the courses selected. It will compare requests from up to seven departments.

Example 1:

- 1. Select the courses to analyze and do an *Options > Show Selected*. This example shows comparing requests from *MCH--11 and MLTST--11* (i.e. 2 courses in 2 different departments)
- 2. From the Reports button open the parameter screen
- 3. Set the *Minimum students in common* that must be in common for comparison. This example was set to 1 (i.e. show me if there is even 1 student who has chosen both courses).
- 4. Click Run



5. Output is 36 students have chosen both courses:

Richmond				Hugl	n Boyd Secondary
		Student	Grouping		
Page 1					August 14, 2020
		Courses	s Analyized		
English MLTST11 EN - (11)LITERARY STUDIES 11A	Science MCH11 SC - CHEMISTRY 11	Request (Combinations		
English	Science				Total Requests
MLTST11 EN - (11)LITERARY STUDIES 11A	MCH11 SC - CHEMISTRY 11				36





Example 2:

- Select the courses to analyze and do an *Options > Show Selected*. This example shows comparing requests from *MCH--11 and MLTST--11 and MPH--11* (i.e. 2 courses in 1 department and 1 course in another)
- 2. From the Reports button open the parameter screen
- 3. Set the *Minimum students in common* that must be in common for comparison. This example was set to 1 (i.e. show me if there is even 1 student who has chosen both courses).
- 4. Click Run

Scenar	io ۱	Workspac	e Courses Student	Staff	Rooms	Rules	Global				
Ор	tions •	Report	s▼ Help ▼ mph11	_	9	70	a	2 II 🖶			2
			Course Catalog			Custom Selection					
	Crs	sNo	Course Conflict Analysis Course Request List			Depa	rtment	School	Hugh Boyd Secondary	PPC	TPY
) MC	CH11	Course Request Verification			Scien	nce	Minimum students in common	1 3	1.0	1/1
V c) ML	TST11	Course Schedule Attributes	11A		Englis	sh	Format	Adobe Acrobat (PDF)	1.0	1/1
) MP	PH11	Course Tally Student Grouping Analysis			Scien	nce (4	O Dun Cansal		1.0	1/1
			Quick Chart					Cancel			

- 5. Output is:
 - 36 Students have chosen MCH--11 and MLTST11 and:
 - 32 Students have chosen MPH--11 and MLTST11

Richmond				Hug	h Boyd Secondary
		Student	Grouping		
Page 1					August 19, 2020
		Courses	analyized		
English MLTST11 EN - (11)LITERARY STUDIES 11A	Science MCH-11 SC - CHEMISTRY 11 MPH-11 SC - PHYSICS 11	Request (Combinations		
English	Science				Total Requests
EN - (11)LITERARY STUDIES 11A	SC - CHEMISTRY 11			•	36
MLTST11 EN - (11)LITERARY STUDIES 11A	MPH11 SC - PHYSICS 11			•	32

NOTE: This report is a Follett report. We are aware there is a misspelling of *Analyzed* and a formatting issue where the *Requested Combinations* header displaying over courses when





multiple courses are selected. To provide the information as quickly as possible, the report has not been corrected/customized for BC.

2.3 Modifying the Scenario Structure

The Scenario structure defines the Terms, Days and Periods that are going to be used to schedule course sections.

If modifications are going to be made to any of these <u>Ensure your Scenario Preference of 'Use shared</u> <u>time structure' is UNCHECKED</u> – this will ensure you do not impact other scenarios (see section 2.1.2 for details)

Make adjustments to your *Scenario Structure* **<u>BEFORE</u>** making changes to schedule information of course sections in the Workspace.

2.3.1 Adjusting Terms

It is *not advisable to Delete schedule terms* during this process. The reason is the application allows the Term value, on the course section (Workspace) to be deleted, leaving the schedule value Day/Period intact – THIS WILL CAUSE SYSTEMS ERRORS WHEN TRYING TO SCHEDULE STUDENTS.

2.3.1.1 Adding Schedule Term Codes values

If the desired Term code is not present, it needs to be added to the Schedule Term reference table.

To add schedule terms to the reference table, go to the *Build View* > *Global* > *Reference* > *Schedule Term Codes* > *Codes* > *Options* > *Add*.

Enter a *Code* and *Description* that will be meaningful to the users and Save.

1-New Model 6Aug										
Pages	Scenario	Workspace	Courses	Student	Staff	Rooms	Rules	Global		
Reference	ces :: Sche	dule Term C	odes :: Nev	w Referenc	ce Cod	e - Comm	ion			
Pattern Library	Options	s 🕶 🛛 Reports 🕶	Help 👻							
Pattern Sets	🖺 Save	Cancel						_		
Requests	Gene	eral Hidden	By Record	Level Security	Code D	ependencies	Translat	e		
Logs	Code *	ion G	и и				_			
Reference Details > Codes	Local co State co	de [
die	Federal	code								
	System	code	1							
	Owner*	н	ugh Boyd Secon	ndary (School) C	2					
	🖺 Save	X Cancel								





2.3.1.2 Adding Schedule Terms

Once the code has been created terms can be created using that code:

- 1. To add additional schedule terms go to Scenario > Terms > Options > Add.
- 2. From the Code drop down list select the desired schedule term. If the term code representing the required schedule term does not appear, add the code into the reference table as described above.
- 3. Use the following table to enter information in the fields:

Field	Description
Code	Select the code for the schedule term. For example, you might select FY for a full-year term, and S1 for Semester 1. Note: School users with the security role of Schedule Builder can create these schedule term codes from the Build View > Global > Reference > Schedule Term Codes > Codes > Options > Add
Name	Type a name for the schedule term.
Base terms per year	Type the total number of this type of schedule term in your schedule. For example, for a course that meets one-third of the year (a single trimester), there are three base terms. For a course that meets half of the year (a single semester), there are two base terms.
Term map	Select the checkbox that represents which of the base terms this specific schedule term covers. For example, if you are defining Q1 1 and there are 4 base terms, select the first checkbox to indicate that this term is the first of the term. Note: The system displays checkboxes that equal the number of base terms you identify at the Base terms per year field. For example, if you identify 4 base terms, four checkboxes appear.
Start & End Dates	Enter when Term starts and ends i.e. when students are receiving instruction.
Grade term cover map	These check boxes are based on the number of Grade Terms defined within the School view. In this sample school the past year had Single Term, Trimester Grades and Quarterly Grades. Check the appropriate boxes to indicate which Grade Terms this Schedule Term will fall within.





2.3.2 Adjusting Days

The number of days defined will appear on a course section when scheduling the section and on the Student > Schedule > Workspace in the Matrix view.

During this process if you are adding days, there is no significant impact.

If you are <u>deleting days</u> you will have to run the *Synchronize Schedule* procedure after deletion in the *Workspace* (see section 2.3.2.1 for details).

To **Add** days:

- 1. On the Options menu, click Add, the Add Day dialog box appears;
- 2. In the Day count field, type the number of days in the schedule scenario.
- 3. Click the TAB key on your keyboard, the dialog box displays the appropriate number of rows, with each row representing one day.
- 4. For each day, type in the Identifier and Name value, for each day.
- 5. Click Save.

To **Delete** days:

- 1. Go into the Details of a Day;
- 2. Select Options > Delete;
- 3. Select *Continue* on the warning message.







2.3.2.1 Synchronize Schedule

• In the *Workspace* tt you will see a blue exclamation at the end of the schedule expression:



- Click *Options > Synchronize Schedule...* The Synchronize Schedule dialog box appears and indicate how many sections have been selected.
- Select Matrix to expression
- Click OK.

1-New Mode	d 6Aug	1						
Pages	Scenario	Workspace	Courses	Student	Staff	Rooms	Rules	Global
Sections								
Master Sections Details Roster	Options Add	Reports -	Help 🔻	Search o Build	on Code	٩	70	III CE2 III 🚔
Teachers Rules Classes	Copy S	Delete Modify List Copy Sections				ons		Current selection: 1 All Sections
Class Size Summary	Query	hots		Pop Rec	ulate Sch alculate E	edule Attribut nrollment Tot	es tals	Synchronize schedule
Matrix View	Show Omit S	Selected Selected		Rota	ition lies		_	Matrix to expression Solution Expression to matrix
Conflict Matrix		Synchronize Schedule (2) Update Designation/ELL Tallies - Build						id 🖉 OK 🗳 🗶 Cancel
Assignment	s							
Schedules								

• The section is no longer scheduled on the day that was deleted:

Course	SecNo	ScheduleTerm > Code ▼	Schedule
MADFS08IB-01	01	S1	1-2(1)

2.3.3 Adjusting Periods

Periods do not have to be deleted. If they are left in and sections are not scheduled into them, they will still appear on a Student Schedule Matrix view as blank cells.

The process for Adding and Deleting Days follows the same steps as section 2.3.2. Adjusting Days above with the exception it is done from the *Days* st.

Like Days if Periods are going to be deleted the Synchronize Schedule procedure will have to be run (see section 2.3.2.1 above).





2.4 Modifying Course Section Schedule Information

Schedule information includes the Term, Schedule (Day/Period) and Teacher.

The Schedule information of course sections can be done on mass via a Mass Update or List edit **Options** > **Mass Update** > **Field=Term**, or **Field=Schedule**

NOTE When mass updating the Schedule field, it is a free form test field and therefore the expression (Day/Period) must be **EXACT.** It would be advisable to only do this with the List Edit functionality.

Alternately, this information can be edited by going into the Details of each course section.

2.4.1 Adding and Deleting Course Sections

Schools maybe altering the number of sections of courses being offered or removing sections of certain courses altogether.

If Schools have decided to offer *New* courses there are a couple of additional steps (see <u>https://www.myeducationbc.info/resources/school-schedulers/</u> MODULE 2 – COURSE CATALOGUES, STUDENT AND STAFF SETUP pdf document).

- First the course needs to be *Added* to the District Catalogue for the 2021 School Year(if not already there);
- Then added to the School course catalogue for the 2021 School Year (School view > Schedule tt > Courses st > Filter = Build Year and;
- Finally *Refreshed* into the scenario currently being worked on (*Build* view > *Courses* tt > *Options* > *Refresh*).

2.4.1.1 Adding Course Sections

Steps:

- 1. Workspace tt > Master st > Options > Add
- 2. New Schedule Build Maser window opens
- 3. Select the lookup magnifying glass in the *Number* field. This will bring up a search window to find the course.
- 4. Select the lookup magnifying glass in the *Staff> Name* field. This will bring up a search window to find the. Teacher.

NOTE: If the teacher is not listed go to **Staff** tt > **Optons** > **Refresh** to make the teacher available.

5. Select the lookup magnifying glass in the *School Room > Number* field. This will bring up a search window to find the Room.

NOTE: If the Room is not listed, it will have to be added in the School view (Schedule tt

> Room st > Options > Add. Then Refresh into the Build view (Rooms tt > Options > Refresh)





6. Select the lookup magnifying glass in the *Schedule Term > Code* field. This will bring up a search window to select the Term.

1-New Model 6Au	1-New Model 6Aug									
Pages Sci	enario Workspa	Courses	Student	Staff	Rooms	Rules	Globa			
Sections :: New Schedule Build Master 2										
Master Sectio	Options - Report	s v Help v								
► Details Roster	Save 🗙 Cance	1								Default Template
Rules	Number *	MCH11 Q 3						Section number *	04	
Classes	Description	SC - CHEMISTRY	11				4	Staff > Name	Aery, Gaville	વ <mark>x</mark>
	Master type	Class						Additional staff for split	Q 🗶	
Class Size Summary								Build Class > Identifier		
Matrix View	School Room >	[111]	ax 6					Prescheduled room		
Conflict	Schedule Term > Code	01	0					Prescheduled term		
Matrix	Schedule	Edit Schedule						Prescheduled		
Assignments	System rank	0						User rank adjustment	0	

7. The next step is to edit the *Schedule* information for this new section. Click the *Edit Schedule* link, to bring up the *Matrix* window.

Note: This will display the *Days* along the top and *Periods* down the left side. If the number of *Days* or *Periods* does not reflect the desired layout, your school is moving to consider going be to section 2.3 *Modifying the Scenario Structure* and making appropriate changes.

Click into each cell to reflect when this course section is to be offered, turning the cell blue.

8. Click Ok.



9. Click *Save* on the newly created course sections.

2.4.1.2 Deleting Course Sections

If Schools need to reduce the number of course sections, these can be deleted from the Workspace.

Steps:





- 1. Select the course sections to Delete;
- 2. Click Options
- 3. Select Delete
- 4. On the *Warning* message pop up window select *Continue*

Sections	6											
Waster	Optio	ns v Repo	orts 🗸	Help 🔻	Search on Course		a-z	# =				
Sections Details	Ad	d			Build	•	► 39 selected Ø					
Roster Teachers Rules	Delete 3 Modify List				Group scheduling Initialize Sections		Schedule	PrimaryStaff > Name				
Classes	Co	py Sections ar Workspace			Load	•	2(3)	Skidmore, Tanglin				
Class Size Summary	Query Snapshots				WARNING: Deleting these 3 Build/MasterSchedule records will also delete the following related records:							
Matrix View	She	ow Selected nit Selected			# Records Table	dule Build Student						
Conflict Matrix					3 Scheo	dule Build Teacher						
Assignments		MDR09IB-0	1 01	FY	_							
Schedules		MDR09IB-0	2 02	FY	D Contine	ue 🗙 Cancel						
Feedback		MDRD-10-01	01	FY			2(6)	Chataway, Peichi				
A		MDRDS11-01	01	FY			2(4)	Chataway, Peichi				
Analysis		MDRDS11-02	2 02	FY			1(4)	Chataway, Peichi				

NOTE: Once the section is deleted, it cannot be restored. It will have to be re-added

2.4.2 Manually scheduling sections of courses

If schools only want to change individual parts of the course section schedule information, each of the fields above can be modified individually.

Follow appropriate steps above, in section 2.4.1.1, to complete this work.

2.5 Scheduling Students

Once the new structure has been defined and course sections re-scheduled students can be scheduled into sections.

2.5.1 Class Roster

Working with several districts on recommendations for this process, all have expressed that manually, re-scheduling students using this method is going to be the quickest and easiest.

From the Roster of a course section (*Workspace* tt > *Details* > *Roster* > *Options* > *Add...*) students can be *Pulled* into a section, *Pushed* or scheduled via a *Snapshot*.

2.5.1.1 Snapshots

A snapshot represents a static list of students. Think of a snapshot as a picture of a particular group of students that you can file and easily retrieve.





Snapshots of students can be created from the *Student* tt in *School* view or *Build* view. Once created they can used from the *Roster* leaf, to schedule groups of students.

1. From the *Options* menu a *Snapshot*:

Conflict Mat	rix ::			
Master	Options Reports Help	Search on Name	78 III 6	z th
Matrix View	Modify List Mass Update		0 of 48 selec	ted 🥖
Conflict	Snapshots			
Matrix	Query		YOG	Schd?
- audents	Show Selected		2022	Y
Assignments	Omit Selected		2022	Y
Schedules	Amadiogontijodeamorim, Antero	· · · · · · · · · · · · · · · · · · ·	2022	Y
	Assen, Nouvenhoangcan		2022	Y

- 2. The *Snapshot* window opens. Click the *New* button.
- 3. A new window opens to identify this *Snapshot*:
 - *Name:* Enter a name;
 - Owner: Set the owner;
 - Save as filter: this will make the Snapshot available to the Owner for future use;

1-New Model 64	Lug	< 1:2 F's, 2 I's, or 1 F and 11 Y	🗣 https://tstl2.myeducation.gov.bc.ca/aspen/createRecordSet – 🔲 X						
Pages Se	cenario Workspace Courses Stud	Search on Name	tst02.myeducation.gov.bc.ca/aspen/createRecordSet.do?deploymentL.						
Conflict Mat	ulu u	Name	Name	Gr10 Cohort 1					
Connectman		 2 F's, 2 I's, or 1 F and 1 I - Final Mark - 2016- 	Owner	Bond, Daniel 🗸					
Master		O 2 F's, 2 I's, or 1 F and 11 - Tri 1 Grade - 2016	Save as filter	•					
	Options • Reports • Help •	0 7	Move to top of my list	o 🙂					
Matrix View	< 1:Aalam, Genvykaren 🗸 >	O At least 2 F's or 2 C-'s - Final Mark - 2016-2017							
Conflict Matrix	Name	At least 2 F's or 2 C-'s - Tri 1 Grade - 2016-2017	Records to Include						
* Students	Aalam, Genvykaren	At least 2 F's or all C-'s - Final Mark - 2016-20	Current List						
Assignments	Athuseyin, Davian	At least 2 F's or all C-'s - Tri 1 Grade - 2016-2	O Snapshot C	ombination					
Schedules	Amadiogontijodeamorim, Antero	Copy of CLARE	Union	▼					
-	Assen, Nguyenhoangcan	Copy of INTERNATIONAL 2020	Him 03	~					
Feedback	Balensesilva, Therign	O Daniel Bond	-						
Analysis	Baxter, Marjolaine	2 + New 2 Copy B Delete		KU .					
	Candott, Harsimarjit								
	Dapavo, Sinung	Use X Cancel							

- 4. In the Records to Include area, users can choose:
 - Current List or;
 - Snapshot Combination

If you selected Snapshot Combination, use the following table to determine how you want to assemble the two snapshots you select:





Select	To include the following in the snapshot:
Code	Select the code for the schedule term. For example, you might select FY for a full-year term, and S1 for Semester 1. Note: School users with the security role of Schedule Builder can create these schedule term codes from the Build View > Global > Reference > Schedule Term Codes > Codes > Options > Add
Union	Any records that appear in the first snapshot you select or the second snapshot you select. For example, if you want to create a snapshot of students who appear on either or both the Gr10 Cohort 1 and Gr10 Cohort 2, select Union
Intersect	Only records that appear in both the first and second snapshot you select. For example, if you want to create a snapshot of students who appear on both Gr10 Cohort 1 and Gr10 Cohort 2 select Intersect.
Difference	Any record that appears in the first snapshot you select, but not in the second. For example, if you want to create a snapshot of students who appear on the Gr10 Cohort 1, but not on Gr10 Cohort 2, select Difference.

The *Snapshot* can be edited later to include or exclude more students. This is done from the *Student* tt. Select the student you wish to add, click *Snapshot st* > *Options* > *Add...* > a list of *Snapshots* will appear > select the appropriate one.

2.5.1.2 Pull and/or Push

Following this path *Workspace* tt > *Details* > *Roster* > *Options* > *Add...* user are presented with a pop-up window to Pull students into a course section by *Selection, Snapshot* or *Another Section.*

Steps for **Pull**:

- 1. Select Selection
- 2. A pop-up window opens. This can be sorted by student Name, YOG, Pupil # or NextHomeroom
- 3. Select the students to be scheduled into this course section.
- 4. Click *OK* on the student selection window.
- 5. Click *OK* on the Pull window





The Push method allows for using the current course section *Roster* to populate other course sections.

Steps for **Push**:

- 1. Select *Remove from current section* if you want to un-schedule students from the current section;
- 2. Select the method you would like to use to choose students. Options are:
 - Current Selection (i.e. the list of students in the section you are working with);
 - Selection or
 - Snapshot (see section 2.5.1.1 for more information)
- 3. Click the Select button;
- 4. From the course section pop-up window select the course sections;
- 5. Click *OK* on course section pop-up window;
- 6. Click *OK* on the Push pop-up window;





1-New Model 6Aug							tst02.myeducation.gov.bc.ca/aspen/pickList.do						
Pages Sce	nario	Workspace	Courses Stu	https://tst02.myeducati	ion.gov.bc.ca – 🔲	<	16:MLFSC11-01		< >		Select All 2 of 466 selected		
Sections :: M	СН1	1-01 - SC - CH	EMISTRY 11	tst02.myeducation	gov.bc.ca/aspen/multiAddSt	mitst1	1	0					
Martin				Schedule Mode	Push ¥		Course	SecType	Platoon	SecNo	Description		
Master Options							MLFSC11-01			01	SC - LIFE SCIENCES 11		
Sections	Sections						MLST-12-01			01	SS - LAW STUDIES 12		
► Roster	Roster					MLST-12-02			02	SS - LAW STUDIES 12			
Teachers Rules		Pupil #	Name	Students			MLTST10-01			01	EN - LITERARY STUDIES 10A (with		
Classes		1182113	Asahan, V	Current selection			MLTST10INC-01			01	EN - LITERARY STUDIES 10 INC (
		774579	Bragagnol	O Selection	Selection 2		MLTST11-01			01	EN - (11)LITERARY STUDIES 11A		
Class Size Summary		747388	Desmone,	Shapshots			MMA08/9IB-01			01	MA - MATHEMATICS 8/9		
Matrix View		902247	Erawat, Ma	Selected students: 27			MMA08IB-01			01	MA - MATHEMATICS 8		
		2175405	Gengathar	Add to the following section	ons: <u>3</u>		MMA08IB-02			02	MA - MATHEMATICS 8		
Conflict Matrix		748111	Havlena, J	MPREC11-01, MLTST11-01			MMA08IB-03			03	MA - MATHEMATICS 8		
	B49606 Hitchner, C					4	6						
Assignments	ignments ☐ 748545 Jalailghad					Ø 0	K X Cancel						

2.5.2 Using Platoons, Teams and/or Houses

Platoons, Teams and/or Houses are 3 ways to cohort a static group of students together, as they take multiple course sections (all function the same).

There are 6 fundamental steps to this process that need to be considered:

- Platoon, Team and/or House fields <u>MUST</u> be checked in the Scenario > Preferences > Category=Scenario Basic
- 2. Reference codes representing Platoon, Team or House or names <u>MUST</u> be created;
- 3. Students *MUST* be assigned a Platoon, Team or House;
- 4. Course sections **MUST** be assigned a Platoon, Team or House;
- Students <u>MUST</u> have course requests for the courses you would like to schedule them into and;
- 6. A Load <u>*MUST*</u> be run to have the students scheduled into the appropriate course sections.

When a Load is run <u>ALL</u> course requests for students will be processed and students re-scheduled.

For detailed information on these 6 items please see the Scheduling Modules list below on the myeducationbc.info website under Resources > School-schedulers:

- 1. MODULE 3 SCENARIOS, PREFERENCES AND TIME STRUCTURE;
- 2. MODULE 4 STUDENT COURSE REQUESTS;
- 3. MODULE 6B SCHEDULING ATTRIBUTES;
- 4. MODULE 8 WORKSPACE AND BUILD VALIDATION;
- 5. MODULE 9 LOAD STUDENTS AND ANALYSIS.