



MyEducationBC

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## Elementary Scheduling

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## Using the Build View for Next Year Scheduling

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June 2020 v1.6

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## Version History

Version	Date	Description
1.0	June, 2015	Initial document created
1.1	June 11, 2015	Update to Section 5 – Loading Students into Sections
1.2	April 13, 2016	Removed sections on District and School courses; Removed section 3.5 Rooms in Build view
1.3	May 1, 2017	Revised for 5.6 (new screenshots)
1.4	April 18, 2019	Added hyperlinks to Table of Contents
1.5	May 8, 2019	Added a note to section 3.4.1 re changing a student's current homeroom.
1.6	June 10, 2020	Updates throughout document

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## 1.0 Purpose

The purpose of this document is to provide information and instruction for setting up a next year master schedule for elementary schools.

## 2.0 Preparing for Build

Next year setup for students, teachers and courses will be done in the Build view. There are some tasks that will need to be completed so the necessary information is available in the Build view.

### 2.1 Security


School users that will be accessing the Build view will require the following security role:

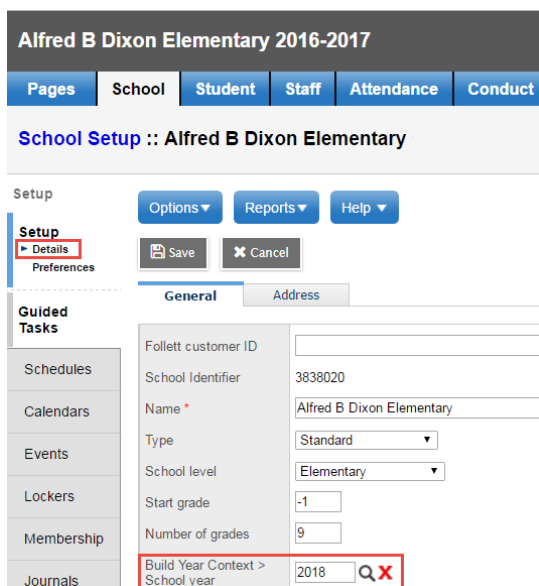
- Schedule Builder

### 2.2 School Details

To use the Build view, the Build Year Context must be set to the appropriate year in the school's details.

#### 2.2.1 To set the Build Year Context:

1. In the **School** view, select the School top tab.
2. Click the **Setup** side tab.
3. Select the **Details** leaf.
4. In the **Build Year Context > School year** field, click the  and select the school year representing *next* year.
5. Click **Save**.



Alfred B Dixon Elementary 2016-2017

Pages | School | Student | Staff | Attendance | Conduct

School Setup :: Alfred B Dixon Elementary

Setup

Options | Reports | Help

Setup

Details | Preferences

Save | Cancel

General | Address

Guided Tasks

Schedules

Calendars

Events

Lockers

Membership

Journals

Follett customer ID

School Identifier 3838020

Name \* Alfred B Dixon Elementary

Type Standard

School level Elementary

Start grade -1



Number of grades 9

Build Year Context > School year 2018




## 2.3 Student Next School Assignments









Placing students into sections will be optional for elementary schools. However, to see students in the Build view, they will require a next school assignment. It will be necessary to assign next school values to students who have been pre-registered for the next school year as well.

### 2.3.1 To assign a next school to students:


1. In the **School** view, select the **Student** top tab.
2. Use the  icon to select **Primary Active Students**.
3. Use the  icon to select the **Pre-Transition** field set. The NextSkI > Name field appears.
4. Populate the *NextSkI > Name* field using one of the following methods:

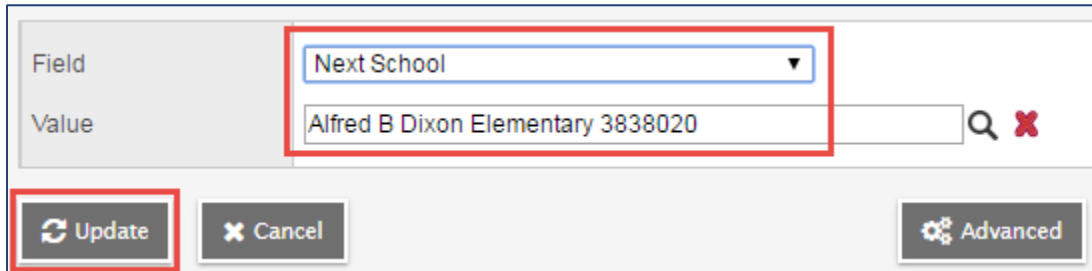
#### Option 1:

- a. In the **Options** menu, select **Modify List**.
- b. Click the  icon to activate the *NextSkI > Name* fields beside each student.
- c. Use the  to select the next school value for the student, or begin typing the school name in the field.
- d. When all values have been assigned, click the  icon to save the records.



School > Name	NextSkI > Name		
	 		
Alfred B Dixon Elementary	<input type="text" value="Alfred B Dixon Elementary"/>		
Alfred B Dixon Elementary	<input type="text" value="Alfred B Dixon Elementary"/>		
Alfred B Dixon Elementary	<input type="text" value="Alfred B Dixon Elementary"/>		

**Option 2:**

- a. Select the student records that will have the same next school value.
- b. In the **Options** menu, select **Mass Update**.
- c. Use the drop down menu to select the **Field** value of **Next School**.
- d. Use the  to select the next school value for these records.
- e. Click the **Update** button to update the records.




**2.3.2 To View Next Year Students**

1. In the **School** view, select the **Student** top tab.
2. Use the  icon to select **Next Year Students**.
3. Use the  icon to select the Pre-Transition field set. The NextSkl > Name field appears.

**2.4 Staff in the School View**

The Build view will look at the existing staff records in the **School** view > **Staff** top tab. If additional staff are required for next year course sections, they can be added to the staff list in the school view. Users may need to refer to their district policy for managing staff records in MyEducation BC (whether this is a school task or a district task).

**2.4.1 To View School Staff Only**

1. In the School view, select the Staff top tab.
2. Use the  icon to select Primary Active Staff.
3. This will show you only the staff active in your school.

**2.5 Staff Secondary School Associations**

There are two scenarios where a school may want to review the secondary school associations attached to staff.



1. Staff who teach at more than one school and this school is the secondary school.

- If these staff members need to be attached to classes for next year in the Build view, they will require a secondary school association for the next school year.
2. Staff who teach at a different school in the current year but are required in this school to assign classes for in next year. Once the new school year has begun, the school can set the appropriate primary school on the staff details and remove or end the secondary school association.

Ensure appropriate staff secondary school associations are in place will make these staff members visible in the Build view to assign to classes.

- These staff members can be given a secondary school association to the new school by their current school, using a next year school context.

### 2.5.1 To assign next year secondary school associations for one staff:

1. In the **School** view, select the **Staff** top tab.
2. Check the box beside the staff member requiring a next year school association where this school is not the primary school.
3. Click the **Schools** side tab.
4. In the **Options** menu, select **Add**.
5. In the **School > Name** field, use the  to select this school, or begin typing the school name for autofill.
6. In the **School year** field, use the  icon to select the next school year.
7. Populating the other fields is optional.
8. Click **Save**.

**Note:** If this school will become the primary school after the end-of-year rollover, the secondary school association will need to be deleted and the primary school name changed in the staff details.

## 2.5.2 To assign next year secondary school associations for all secondary staff:

1. In the **School** view, select the **Staff** top tab.
2. In the **Options** menu, select **Rollover Staff Schools**.
3. Click **OK**.

## 2.6 Courses

### 2.6.1 District Course Catalogue

The district course catalogue must be created for the next school year so schools can copy or create their course catalogues for the next year. Ensure the required elementary-level courses are in the district catalogue, including the ATT—AM and ATT—PM courses for elementary attendance, if using the period attendance method for elementary schools. The XAT—EL course should also be available for districts with StrongStart Centres.

Please refer to Scheduling Module 2 Course Catalogues, Student and Staff setup, on the [www.myeducationbc.info](http://www.myeducationbc.info) website under Resources > School Scheduler Resources.

### 2.6.2 School Course Catalogue

School course catalogues need to be copied to the next year.

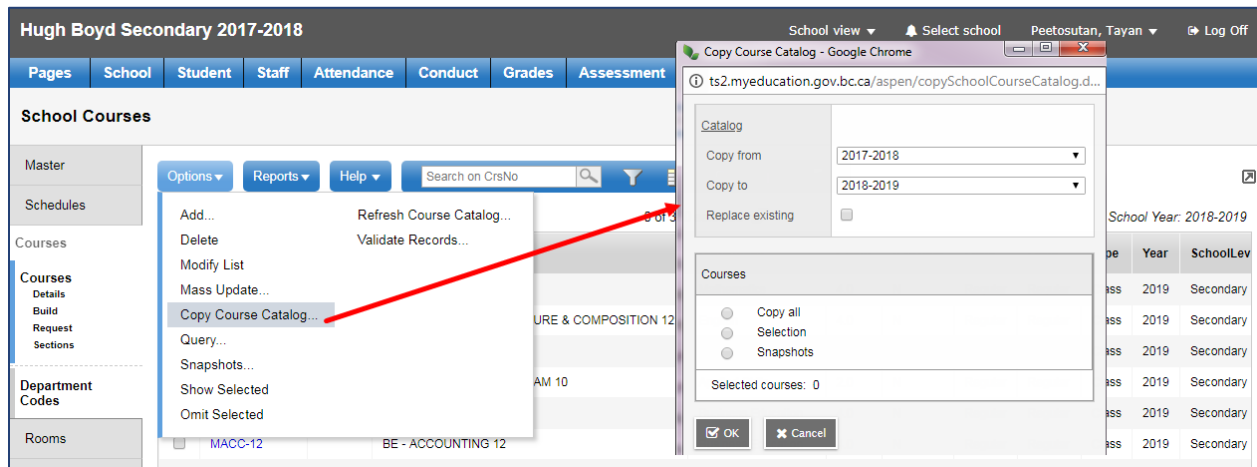
Please refer to Scheduling Module 2 Course Catalogues, Student and Staff setup, on the [www.myeducationbc.info](http://www.myeducationbc.info) website under Resources > School Scheduler Resources.

### 2.6.3 Copying the School Course Catalogue

School course catalogues can be copied forward from one year to the next. In order to do so, the course must first exist in the district course catalogue.

1. Log on to the School View
2. Click the Schedule top tab
3. Click the Courses Side tab
4. Go to Options and select, Copy Course Catalog
5. From the popup window:
  - a. Select the year to copy from and the year to copy to
  - b. Note the option to “Replace existing”
6. Select to Copy all, copy a Selection, or copy from a Snapshot.





## 2.7 Rooms

Rooms that are currently in the school will appear in the Build view when a scenario is created.

To review room information:

1. In the **School** view, select the **Schedule** top tab.
2. Click on the Rooms side tab. Review the rooms available.
3. In the **Options** menu, select **Add** to create additional rooms, if necessary.
  - a. **Number**: Enter the room identifier.
  - b. **Include in scheduling**: Check this box if the room needs to be available for selection when creating or modifying the information on a course section.
  - c. All other fields are optional.

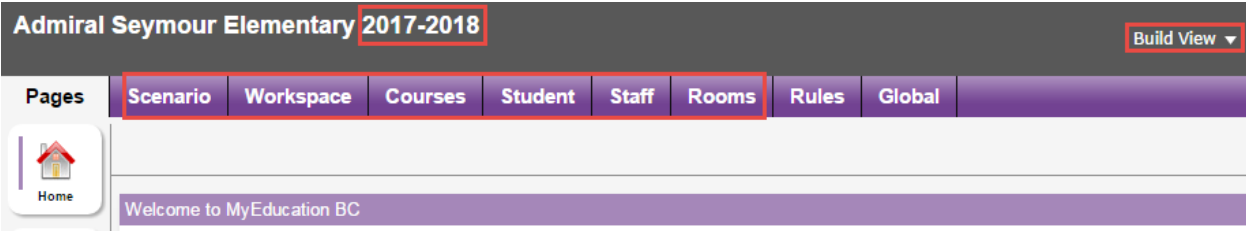
## 3.0 The Build View

The Build view is the area in MyEducation BC where schools can prepare their schedule structure and setup for their next school year. This view contains information on students, staff, courses and rooms.

In the context of an Elementary school, or any school (Secondary, Middle, DL, CE, etc.) the Build View can be used to create the next year course sections. This can be done by copying the current year structure and schedule into the Build view, or by creating a new structure.

To access the **Build** view:

1. In the **School** view, select **Change View** on the *Settings Bar*.
2. Select **Build**.



- Ensure the school name at the top shows the next school year.
- Notice the application background colour has changed and the Build view is indicated in the upper right corner below the *Settings* bar.
- Note that top tab selections are different from the School view.

### 3.1 Creating a Scenario

**Build view > Scenario** top tab

Scenarios define the structure of the master schedule.

**To create a scenario as a copy of the current schedule:**

1. In the **Build** view, select the **Scenario** top tab.
2. In the **Options** menu, select **Copy Active Schedule**.
3. Populate the fields as follows:
  - a. **New scenario name:** give the scenario a name that makes sense to the user.
  - b. **Items to include: Master Schedule:** check this box to copy the master schedule and all sections from the current year.

New scenario name	Copy of 2016-2017 Active Schedule
<u>Items to include</u>	
Master schedule	<input checked="" type="checkbox"/>
Clear platoon code	<input type="checkbox"/>
Student schedules	<input type="checkbox"/>
Rules	<input type="checkbox"/>

\*\* Time structure and schedule attributes will be copied automatically.

4. Click **OK**. The scenario will now appear in the list.

Captain James Cook Elementary 2017-2018

Build View ▾ ▲ Select School Cultura, Sbneighbourhood ▾ Log Off

Pages Scenario Workspace Courses Student Staff Rooms Rules Global

Scenarios

Details Options ▾ Reports ▾ Help ▾ Search on Name 🔍

Preferences 0 of 1 selected 🍷 Current Build Context

Name	Start	End	Term	DPC	PPD
Copy of 2016-2017 Active Schedule	09/08/2017	08/08/2018	1/1	1	2

5. Click into the Scenario Details.
6. Click SAVE.

### 3.1.1 Terms

**Build View>Scenario** top tab > Select scenario > **Terms** side tab

Confirm that there is one full year schedule term in this screen.

Captain James Cook Elementary 2017-2018

Build View ▾

Copy of 2016-2017 Active Schedule

Pages Scenario Workspace Courses Student Staff Rooms Rules Global

Scenarios :: Copy of 2016-2017 Active Schedule

Details Options ▾ Reports ▾ Help ▾ Search on Code 🔍

Preferences 0 of 1 selected 🍷

Code	Name	BaseTPY	CoveredTPY	BaseMap
<input type="checkbox"/> FY	FY	1	1	1

### 3.1.2 Days

**Build View>Scenario** top tab > Select scenario > **Days** side tab

Elementary schools that are using the period-based attendance model with the ATT—AM and ATT—PM courses will require days in the school.

- If the school is currently using period-based attendance in the current year and has created the scenario by copying the current active schedule, then the **Day** value will have been copied over. Confirm that it is in place.
- If the school is not currently using period-based attendance in the current year, but intends to use it next year, then add 1 day to this screen. Using the **Options** menu, select **Add** and enter the required value.

**Captain James Cook Elementary 2017-2018** Build View ▾

*Copy of 2016-2017 Active Schedule*

Pages Scenario Workspace Courses Student Staff Rooms Rules Global

Scenarios :: Copy of 2016-2017 Active Schedule

Options ▾ Reports ▾ Help ▾ Search on Number 🔍

0 of 1 selected

Number	ID	Name
1	1	1

### 3.1.3 Periods

Build View>Scenario top tab > Select scenario > **Periods** side tab

Elementary schools that are using the period-based attendance model with the ATT—AM and ATT—PM courses will require periods in the school.

**NOTE:** There is currently a request in with the Operations Standards Committee, for the recommendation of moving ahead with ATT-AM and ATT-PM courses for Attendance.

- If the school is currently using period-based attendance in the current year and has created the scenario by copying the current active schedule, then the **Period** value(s) will have been copied over. Confirm that they are correct.
- If the school is not currently using period-based attendance in the current year, but intends to use it next year, then add the required periods to this screen. Using the **Options** menu, select **Add** and enter the required values.

**Captain James Cook Elementary 2017-2018** Build View ▾

*Copy of 2016-2017 Active Schedule* Select

Pages Scenario Workspace Courses Student Staff Rooms Rules Global

Scenarios :: Copy of 2016-2017 Active Schedule

Options ▾ Reports ▾ Help ▾ Search on Number 🔍

0 of 2 selected

Number	ID	Name	Scheduled?
1	AM	AM	Y
2	PM	PM	Y

## 3.2 Courses

### Build view > Courses Top tab

Courses that have been added to the school course catalogue through the Build Year in the school view will appear in this list. The following sub-sections include information on adding and removing courses for the Build view and their attributes.

#### 3.2.1 Adding and Removing Courses from the Build View

The course list should be reviewed to ensure all courses are in the list for use. Common scenarios are listed in the table below if a user identifies courses that are not showing in the list.

Problem	Resolution	Path
Course is in the School view list under Build Year, but does not show in the Build View > Courses list	<ol style="list-style-type: none"> <li>1. Check if the course is marked to “Include in scheduling”</li> <li>2. Refresh the course list in the Build view</li> </ol>	<ol style="list-style-type: none"> <li>1. Build view &gt; Courses top tab <ul style="list-style-type: none"> <li>• Set filter to <b>All Records</b></li> <li>• Set field set to <b>Required Crs Fields</b></li> <li>• Check the <b>Schd?</b> Field. If set to N, click into the detail of the course and check the box for “<b>Include in Scheduling</b>”</li> </ul> </li> <li>2. <b>Build view &gt; Courses</b> top tab <ul style="list-style-type: none"> <li>• <b>Options &gt; Refresh</b></li> </ul> </li> </ol>
Course was added to the Build view > Courses in error and cannot be deleted.	Courses can be added to the Build view, but must be deleted through the School view.	<b>School view &gt; Schedule</b> top tab <ul style="list-style-type: none"> <li>• <b>Courses</b> side tab &gt; set filter to <b>Build Year</b></li> <li>• Check the box beside the course to be deleted.</li> <li>• <b>Options &gt; Delete</b></li> </ul>

#### 3.2.2 Course Attributes in the Build View

### Build view > Courses side tab > Elementary Required Fields field set

The only fields that are necessary for elementary schedule building are:

- **Include in scheduling:** This should be checked by default when the current active schedule was copied in the scenario. Double-check this field if the course is required for scheduling but is not appearing in the list.
- **Section enrollment max:** This is optional and will not be observed when using group scheduling functions. However, when enrolling additional students throughout the school year, setting this maximum would warn the user that the section is already full.

These fields can be updated from the course list screen using either Mass Update or Modify List options.

Copy of 2016-2017 Active Schedule

Pages Scenario Workspace **Courses** Student Staff Rooms Rules Global

Courses ⚠

Details Requests Sections Rules Snapshots

Options Reports Help Search on CrsNo 0 of 2 selected

<input type="checkbox"/>	CrsNo	Description	Schd?	EnrMax
<input type="checkbox"/>	ATT-AM	AM ATTENDANCE	Y	0
<input type="checkbox"/>	ATT-PM	PM ATTENDANCE	Y	0

### 3.3 Staff in the Build View

#### Build view > Staff top tab

Staff members cannot be added or deleted in the Build view.

The Staff top tab will display staff members who were in the School, when the scenario was created.

If staff do not appear, refresh the list.

To refresh list:

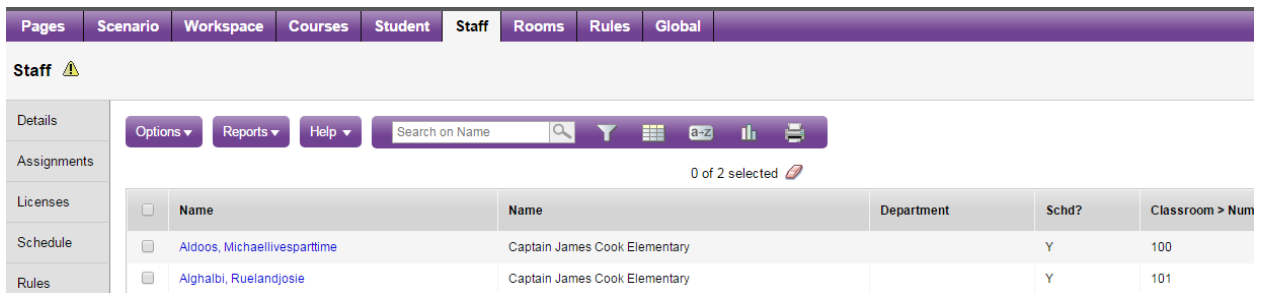
1. **Build** view > **Staff** top tab.
2. Set the filter to **All Records**.
  - a. Check if the staff member now appears, but has their **Schd?** Field set to “N”. Click into the detail of the staff record and check the box for **Include in scheduling**.
  - b. If the staff member still does not appear, proceed to Step 3 below.
3. In the **Options** menu, select **Refresh**.

#### 3.3.1 Staff Attributes in the Build View

The only fields that are necessary for elementary schedule building are:

- **Include in scheduling:** check this box if this staff member needs to be in the list to assign to a course section.
- **Classroom > Number:** this field is optional, but if a classroom is assigned to a specific teacher, it can be assigned here.

These fields can be updated from the staff list screen using either Mass Update or Modify List options.



<input type="checkbox"/>	Name	Name	Department	Schd?	Classroom > Num
<input type="checkbox"/>	Aldoos, Michael	livesparttime	Captain James Cook Elementary	Y	100
<input type="checkbox"/>	Alghalbi, Rueland	josie	Captain James Cook Elementary	Y	101

## 3.4 Students

**Build** view > **Student** top tab

The **Student** top tab in the Build view will show the students available for next year scheduling. If the correct number of students does not display, go to the **Options** menu and select **Refresh**. This will refresh the list with the latest information of students with next school values for this school.

The following filters and field sets have been created to assist with grouping students and viewing the appropriate fields.

- Elem – with Hrm info – Field Set
- Elem – Current Hrm Contains ? - Filter
- Elem – Nxt Hrm Contains ? – Filter

### 3.4.1 Student Attributes in the Build View

- **Include in scheduling:** check this box if this student needs to be in the list to assign to a course section.
- **Next Homeroom:** this field is optional but can be populated for the purposes of organizing next year students. If the field is populated in the Build view, it will appear automatically in the School view and vice-versa. The end of year rollover process will automatically copy the contents of the Next Homeroom into the Homeroom field.

**NOTE:** Changing the Homeroom value in Build will change the student’s CURRENT homeroom in School View.

## 4.0 Using the Workspace

The **Workspace** top tab displays the sections and section information that was copied over when the scenario was created, from the current year active schedule.

This is where the school can add or remove sections, and modify the information on sections.

The following filters and field sets have been created to assist with viewing and updating records in the workspace.

- Elem – Section Detail – Field Set
- Elem – Section # = ? - Filter

### 4.1.1 Modifying information on sections

Modify List or Mass Update functions can be used on these fields to make necessary adjustments:

- **SecNo:** The section number can be adjusted, if necessary.
- **PrimaryStaff > Name:** Staff member assigned to the section can be adjusted as necessary.
- **PrimaryRoom > Num:** A room can be assigned as appropriate. This is optional.
- **ScheduleTerm > Code:** all sections should have a term code of FY for elementary schools.
- **Schedule:** A schedule expression is only necessary for courses in which attendance is being recorded (ATT—AM and/or ATT—PM).
- **Platoon:** If platoons are being used for group scheduling, the values can be updated here. This is not necessary if the school is not using platoon codes for Group Scheduling.

**NOTE:** Group Scheduling will be covered in the August timeframe.

Copy of 2016-2017 Active Schedule

Pages Scenario **Workspace** Courses Student Staff Rooms Rules Global

Sections

Master Options Reports Help Search on Course

Sections Details Roster Teachers Rules

0 of 30 selected





	Course	SecNo	Primary Staff > Name	PrimaryRoom > Num	ScheduleTerm > Code	Schedule	Platoon	PlatoonScheduleMode	Team	Max	Total
<input type="checkbox"/>	ATT-AM-001	001	Nazargahi, Junxue	ATT	FY	AM(1)	01	0		26	0
<input type="checkbox"/>	ATT-AM-002	002	Harrisonwoodman, Auntrajwant	ATT	FY	AM(1)	02	0		26	0
<input type="checkbox"/>	ATT-AM-003	003	Hietljes, Hilderoger	ATT	FY	AM(1)	03	0		26	0
<input type="checkbox"/>	ATT-AM-004	004	Drkwilakowski, Eldene	ATT	FY	AM(1)	04	0		26	0

### 4.1.2 Adding a section

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

If additional sections are required for a course, they can be added here:



1. In the **Options** menu, select **Add**.
2. In the **Number** field, use the  to select the course code that requires the new section.
3. Populate the **Section number** field with the desired value.
4. Use the  in the **Staff > Name** field to select the staff member for the section.
5. Use the  in the **SchoolRoom > Number** field to select the room for the section.
6. Use the  in the **Schedule Term > Code** field to select the FY term code for the section.
7. Click the **Edit Schedule** hyperlink on the **Schedule** field *only if attendance will be taken on this course*.
8. The **Platoon** field is optional and could be selected, if the school is using the Group Scheduling function.
9. Click **Save**.









2016-2017 Active Schedule

Pages Scenario **Workspace** Courses Student Staff Rooms Rules Global

Sections :: ATT-AM-001 - AM ATTENDANCE

Master Options Reports Help

Sections Details Roster Teachers Rules Save Cancel

Number *	ATT-AM 	Section number *	001
Description	AM ATTENDANCE	Staff > Name	Nazargahi, Junxue
Master type	Class	Additional staff for split	 
School Room > Number	ATT  	Prescheduled room	<input type="checkbox"/>
Schedule Term > Code	FY  	Prescheduled term	<input type="checkbox"/>
Schedule	AM(1) 	Prescheduled schedule	<input type="checkbox"/>

### 4.1.3 Deleting a section

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

If sections have been created that are not required for the next school year, they can be deleted here:

1. Check the box beside the section(s) to be deleted.
2. In the **Options** menu, select **Delete**.
3. Read the pop-up window and click **Continue** to confirm the deletion or **Cancel** to stop the deletion.

## 5.0 Loading Students into Sections

There are different options for loading students into sections of their courses for the next school year. Since elementary students stay in the same classroom with the same teacher for the full year, it is not necessary to load them into all the sections of all of their courses before the year rolls over. Group Scheduling or Homeroom Snapshot options can be used in the School View to load students as a school start-up task.

If the school really wants to load students into a section in the Build view, ***it is suggested that only one class is loaded*** (perhaps an ATT—AM section or an XAT homeroom section). If there is a change to the student roster, only one class would then need to be maintained. When the school year is rolled over, students could then be loaded into the rest of their courses using Group Scheduling or homeroom snapshot options defined in the Elementary Scheduling Guide.

Consider the following:

- How stable is the school population and how much adjustment would be made to students between different classes?
  - If the school population is highly transitional, the school may want to wait until the year rolls over and then assign new homerooms to students in the new school year.
  - If the population is quite stable and little movement of students between classes is expected, the school could use the Next Homeroom field to group students for next year classes.
- Create Next Homeroom snapshots in the student top tab. This would enable you to load students into all their courses by snapshot when the year has rolled over and the student population is more settled. Keep in mind that snapshots are static lists, so new students would need the appropriate snapshot added to their record and students withdrawing would need the appropriate snapshot deleted from their record.
- Create Platoon snapshots
- Loading students in the Build view would provide a way to generate class lists prior to the school year rollover.

## 5.1 To load students in the Build View

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

1. Select the section to add students to by checking the box beside the section.
2. Click the **Roster** leaf.
3. In the **Options** menu, select **Add**.
4. Set the **Schedule Mode** drop-down menu to **Pull**.
5. In the **Students** area, select the method to use to select the students for this section:
  - a. **Selection**: allows the user to select multiple students, one by one.
  - b. **Snapshots**: can be used if a snapshot has been created to group students for loading into classes.
6. Click **OK**. The students will now appear in the roster list for the selected section.

The screenshot shows the MyEducationBC interface with the 'Workspace' tab selected. The 'Sections' sidebar on the left has 'Roster' selected. A 'Multi-Add Students' dialog box is open, showing the 'Schedule Mode' set to 'Pull' and the 'Snapshots' radio button selected. The 'Selected students' count is 28. The 'OK' button is highlighted.

## 6.0 Generating Class Lists

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

If students have been loaded into a section of a course in the Build view, class lists can be generated for each teacher. **Note:** Class lists will only be generated for classes that have students in them. Empty sections will not generate a blank list.

1. In the **Reports** menu, select **Students** and click on **Class Lists**.
2. Use the **Sections to include** drop-down menu to select which sections class lists are being generated for. If anything other than **Current Selection** is chosen, the user will be required to enter the **Search Value** *exactly* as the selected detail on the class is entered.
3. Use **Sort results by** to choose what order the report will be generated in.
4. Click **Run**.

## 7.0 K-12 Considerations

K-12 schools that are scheduling the secondary grade levels, using the full functionality of the Build and Load, should submit a ticket, requesting one-on-one district support session to determine their individual requirements.