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Student Data Management

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Calendars & Pathway Scheduling

CODELEVEL SERVICES LLC

Agenda

In this session, users will build schedules for Pathways. These represent the offerings to students during a given time frame and are later used to drive attendance processes.

- Scheduling Pathways
- Entering Variances to Schedules
- Entering Calendar Events
- Schedule Verification Options

Schedules

Most Pathways should have at least one schedule associated to it, as this is the only place where date, time, and location information is to be noted.

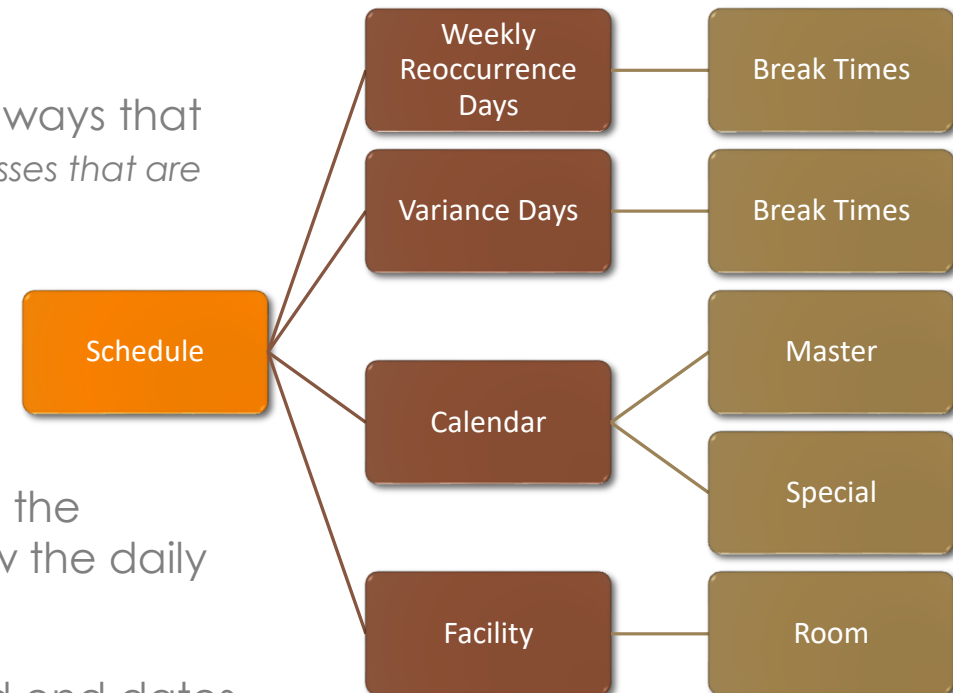
Non Scheduled: This represents the option for those Pathways that do not require a schedule. *Often times these are contract classes that are entered into the system after the training has occurred.*

Fixed: Student is expected

- To Start when schedule starts (unless a late Start)
- To Finish when schedule ends (unless an early Withdrawal)

Open: Student can start and finish at any date between the schedule's start and end dates, but is expected to follow the daily schedule while active.

Flex: Student can attend anytime between the start and end dates of the schedule, but is expected to commit to a selected number of hours per week once they start.



Add a New Recurring Schedule

BASICS

For a recurring, **pattern-based** schedule...

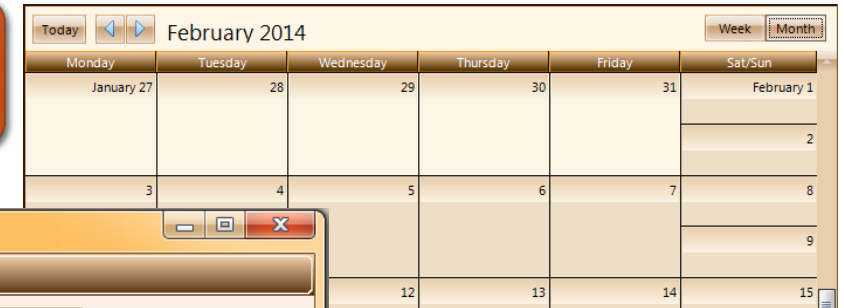
1. Navigate to the Pathway Module
2. Search for and select the applicable Pathway
3. Choose the Scheduling Session
4. Click on "Add Schedule" to bring up the scheduling calendar
5. **Click on the Recurrence tab FIRST**
6. Name the Schedule (or use the default)
7. Set the Start Date and End Date
8. Choose the Days of the Week for which this schedule will meet
9. Set the Start and End Times for these sessions
10. Click on "Save and Close"

Click on "Recurrence" For Schedules greater than 7 concurrent days

Best to keep title shorter

Location information is not required but should be entered if known.

Basic scheduling, defined to the left, does not allow break time settings.



Calendars (Affecting the Schedules)

Using a recurring schedule makes it easy to set up a long term schedule. However, what about those days that were scheduled but are Holidays, In-service days, etc. and usually affect all classes and programs?

Let's use the Calendars!

When a “No Class” day, such as Thanksgiving Day is entered into a calendar, it automatically removes this day from any schedule that is associated with this calendar. For most schools, the Master Calendar is used to specify all the days that the entire school is closed (or not in session).

These Calendar events are setup in the “My School” Module within the “Calendars” Session.

My School << Today June 2017 Day Week Month

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
May 29 Memorial Day - Holi	30	31	June 1	2	3
					4
	6	7	8	9	10
					11
12	13	14	15	16	17
					18
19	20 Spring Quarter Ends	21 No Class	22 No Class	23 No Class	24
					25
26 No Class	27 No Class	28 No Class	29 No Class	30 No Class	July 1
					2

My Page
Students
Pathways
Classes
Industry
Funds
Services
Programs
Staff
Courses
Facilities
Assets
Rooms
My School

Double-click on any day to Add an event.

Calendars (Affecting the Schedules)

SCHEDULE BEFORE “NO CLASS” DAYS ADDED TO THE CALENDAR

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
August 18 8:00am Autom	19 8:00am Autom	20 8:00am Autom	21 8:00am Autom	22 8:00am Autom	23
					24
25 8:00am Autom	26 8:00am Autom	27 8:00am Autom	28 8:00am Autom	29 8:00am Autom	30
					31
September 1 8:00am Autom	2 8:00am Autom	3 8:00am Autom	4 8:00am Autom	5 8:00am Autom	6
					7
8 8:00am Autom	9 8:00am Autom	10 8:00am Autom	11 8:00am Autom	12 8:00am Autom	13
					14

SCHEDULE AFTER “NO CLASS DAYS WERE ADDED.

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
August 18 8:00am Autom	19 8:00am Autom	20 8:00am Autom	21 8:00am Autom ★ Tired of the Ki	22 8:00am Autom	23
					24
25 8:00am Autom	26 8:00am Autom	27 8:00am Autom ★ Startup Break	28 8:00am Autom	29 8:00am Autom	30
					31
September 1 8:00am Autom	2 8:00am Autom ★ Bill's Birthday	3 8:00am Autom	4 8:00am Autom ★ Erica's Day	5 8:00am Autom	6
					7
8 8:00am Autom ★ Teacher Work	9 8:00am Autom	10 8:00am Autom	11 8:00am Autom	12 8:00am Autom	13
					14

Was not marked as a “No Class” day

Calendars (Affecting the Schedules)

Medical Assistant

MON	TUE	WED	THU	FRI
█	█	█	█	□
█	█	█	█	□
█	█	█	█	□
█	█	█	█	□

MON	TUE	WED	THU	FRI
Holiday	█	█	█	□
█	█	█	█	□
█	█	█	█	□
█	█	█	█	□

Calendar Event

Welding

MON	TUE	WED	THU	FRI
█	█	█	█	█
█	█	█	█	█
█	█	█	█	█
█	█	█	█	█

MON	TUE	WED	THU	FRI
Holiday	█	█	█	█
█	█	█	█	█
█	█	█	█	█
█	█	█	█	█

Calendar Event

Computer Classes

MON	TUE	WED	THU	FRI
█	□	█	□	█
█	□	█	□	█
█	□	█	□	█
█	□	█	□	█

MON	TUE	WED	THU	FRI
Holiday	□	█	□	█
█	□	█	□	█
█	□	█	□	█
█	□	█	□	█

Calendar Event

Schedule Variances

Variances are entered directly into a Pathway schedule in order to “add”, “subtract”, or “alter” a session from the recurring pattern and override all calendar events (specifically those marked as non-class days in the calendar).

Add a Day

MON	TUE	WED	THU	FRI
■	■	■	■	□
■	■	■	■	□
■	■	■	■	□
■	■	■	■	□

Recurring Pattern

MON	TUE	WED	THU	FRI
■	■	■	■	■
■	■	■	■	■
■	■	■	■	■
■	■	■	■	■

Additional Scheduled Day

Remove a Day

MON	TUE	WED	THU	FRI
■	■	■	■	□
■	■	■	■	□
■	■	■	■	□
■	■	■	■	□

Recurring Pattern

MON	TUE	WED	THU	FRI
■	■	■	□	■
■	■	■	□	■
■	■	■	□	■
■	■	■	□	■

Removed Scheduled Day

This could also be done with the Calendar

Alter a Day

MON	TUE	WED	THU	FRI
■	■	■	■	□
■	■	■	■	□
■	■	■	■	□
■	■	■	■	□

Recurring Pattern

MON	TUE	WED	THU	FRI
■	■	■	■	■
■	■	■	■	■
■	■	■	■	■
■	■	■	■	■

Altered Scheduled Day

Add a Schedule Variance (General)

BASICS

1. Navigate to the Class or Pathway Module
2. Click on the Scheduling Session
3. Double click on the day you wish to add or remove from the reoccurring schedule.
4. For a variance entry, select "No" to the message.
5. When adding a day, SELECT THE SCHEDULE you want to add the variance to from the Schedule Title drop down list. *The form will change to >>> Creating Variance.....*
6. The date should be correct, so set the start and end times.
7. Click on "Save and Close" and the new day is added to the schedule.

Variances are:

- scheduled days that fall outside of the recurring pattern in order to add additional days to the schedule, or...
(Double-click on a non-scheduled day to add that day to the schedule)
- are used to remove a day within an existing schedule, or...
(Double-click on an existing scheduled day to remove it)
- allows a change to the start/end times of a specific scheduled day
(Double-click on an existing scheduled day to alter its scheduled times)

The screenshot displays a calendar grid for February 24 to March 1. The grid shows scheduled sessions for 'All Day' and 'Morning' on various days. A dialog box titled 'Career Major Schedule Information' is open, showing the 'Morning (Master)' schedule selected. The dialog box includes fields for 'Date' (03/15/2014), 'Start Time' (12:00 AM), and 'End Time' (12:00 AM). A checkbox for 'Schedule Break Time' is present, with 'Break Start' and 'Break End' fields set to 12:00 AM. A callout bubble with a yellow background and black border points to the dialog box, containing the text: 'DO NOT FORGET THIS STEP or you will end up creating a new schedule!'.

Adding an Additional Day into a Schedule

BASICS

1. Locate the desired Pathway
2. Choose the Schedule session
3. Locate the day on the calendar where the new session will occur, then double-click on it
4. Be sure to select the schedule for which the additional session needs added
5. Enter the Start or End times to the appropriate times for this session
6. Choose "Save and Close"

Today June 2014 Week Month

Monday Tuesday Wednesday Thursday Friday Sat/Sun

April 7 8 9 10 11 12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

1 2 3 4

5 6 7 8 9

8:20am Nursing Assistan 8:20am Nursing Assistan 8:20am Nursing Assistan

24 25

ssistan 9:00am Nursing Assistan

May

Career Major Schedule Information

Save and Close Delete Recurrence

Schedule Title: Nursing Assistant 1314

Start Time: 04/25/2014 12:00 All day event

End Time: 04/25/2014

Location

Off Campus Campus Facility Room

Filter by Available Availability

Career Major Schedule Information

Save and Close Delete

Schedule Title: Nursing Assistant 1314

>>>> Creating Variance Day for Schedule Nursing Assistant 1314 <<<<<

Date: 04/25/2014 Start Time: 09:00 AM End Time: 02:00 PM

Schedule Break Time Break Start: 12:00 AM Break End: 12:00 AM

BE SURE TO select the schedule for which the additional day needs added

Double-click on the calendar day where the session needs added

Enter the times for this new class meeting session, then Save & Close

The new session will appear in the schedule

Removing an Unexpected Non-class Day from a Schedule

BASICS

1. Locate the desired Pathway
2. Choose the Schedule session
3. Locate the day in the schedule that needs removed and double-click on the appropriate schedule text
4. Select "No" to the dialog
5. Choose the Delete option on the Variance Day dialog and the scheduled day will be removed from the schedule

The screenshot displays a scheduling application interface for June 2014. The main window shows a calendar grid with days of the week and dates. A specific date, June 15th, is highlighted in blue, indicating a selected schedule entry. A dialog box titled "Scheduled Day" is open, asking "Do you want to edit the entire series? Select 'No' to modify just the selected day." with "Yes", "No", and "Cancel" buttons. A callout points to the "No" button, stating "Choose 'No' so that only the selected day is removed". Another callout points to the selected date in the calendar, stating "Double-click on the schedule text for the day that needs removed". A third callout points to the "Delete" button in the "Career Major Schedule Information" dialog, stating "Choose 'Delete' and this day will be removed from the schedule". The "Career Major Schedule Information" dialog shows fields for "Schedule Title" (Nursing Assistant 1314), "Date" (05/15/2014), and a checked "Schedule Break Time" option.

Changing the Scheduled Times for a Class Day

BASICS

1. Locate the desired Pathway
2. Choose the Schedule session
3. Locate the day in the schedule that needs the hours altered and double-click on the appropriate schedule text
4. Select "No" to the dialog
5. Change the Start or End times to the appropriate times for this session
6. Choose "Save and Close"

The screenshot displays a scheduling interface for June 2014. A calendar grid shows days from Monday to Saturday. A 'Scheduled Day' dialog box is open, asking: "Do you want to edit the entire series?. Select 'No' to modify just the selected day." with 'Yes', 'No', and 'Cancel' buttons. A callout points to the 'No' button, stating: "Choose 'No' so that only the selected day is effected". Another callout points to a double-clicked cell on Thursday, June 17, containing "8:20am Nursing Assistan", stating: "Double-click on the schedule text for the day that needs modified". A third callout points to the 'Career Major Schedule Information' dialog box, stating: "Make the needed changes to the schedule and Save". This dialog box shows "Nursing Assistant 1314" and "Modifying Variance Day for Schedule: Nursing Assistan 1314". It includes fields for Date (04/17/2014), Start Time (08:20 AM), End Time (01:00 PM), and Break Start (11:00 AM) and Break End (11:55 AM). Buttons for "Save and Close" and "Delete" are visible at the top.

Calendars (Affecting the Schedules)

Using each of these tools, we can create a recurring schedule to start, then make modifications as needed.

MON	TUE	WED	THU	FRI
■	■	■	■	□
■	■	■	■	□
■	■	■	■	□
■	■	■	■	□



Calendar Event

MON	TUE	WED	THU	FRI
Holiday	■	■	■	□
■	■	■	■	■
■	■	■	□	□
■	■	■	■	□

Additional Scheduled Day

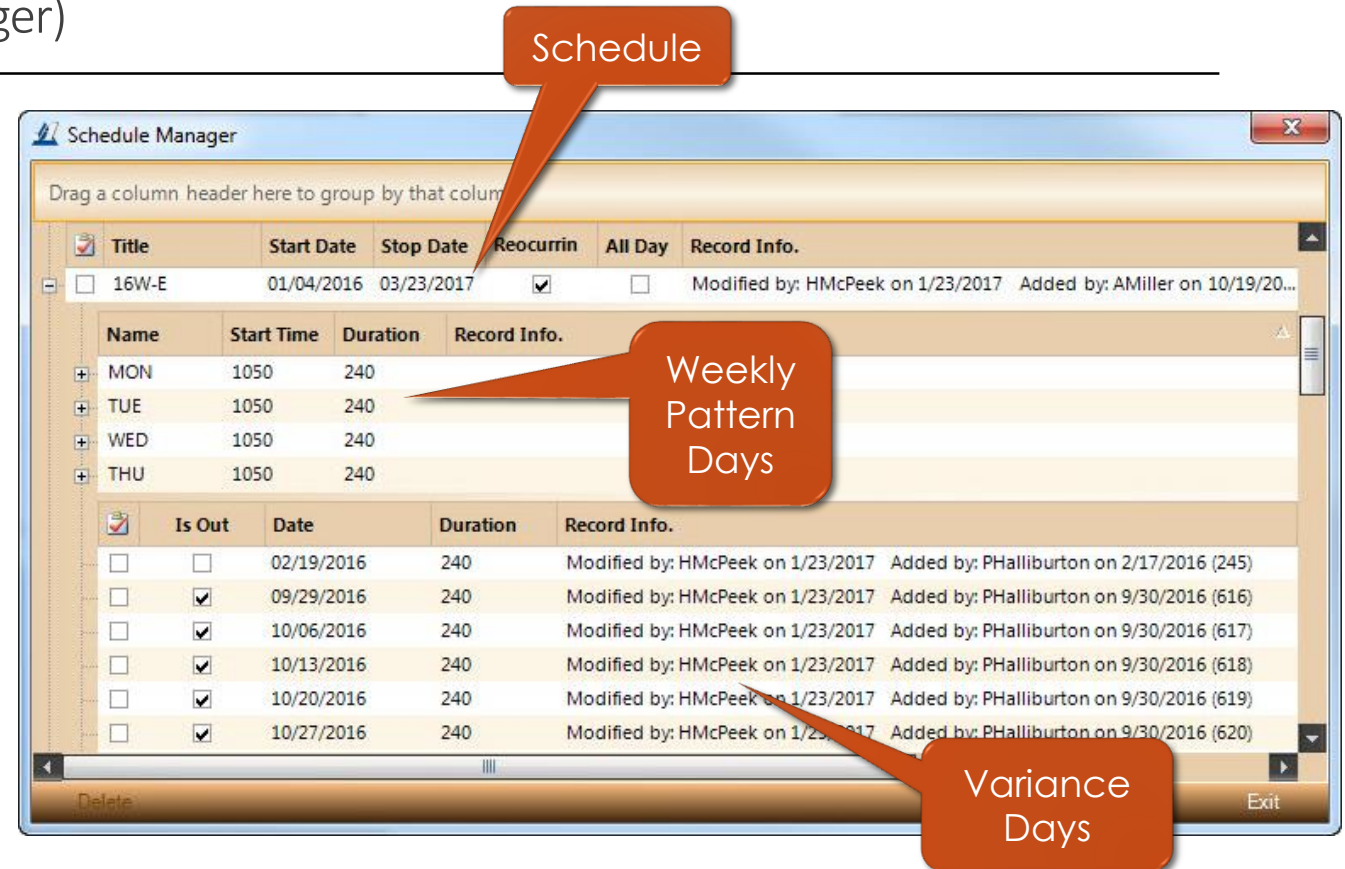
Removed Scheduled Day

Altered Scheduled Day

Schedules (Schedule Manager)

While the schedule is displayed in the “calendar” view, it may be hard to see or locate all of the scheduled days, variances, etc.

The Schedule Manager allows a different method to look and work with the schedules.



How to remove a variance record...

1. Select the checkbox next to the variance (the column with the clipboard)
2. Choose Delete at the bottom of the form
3. Select Delete All on the confirmation dialog.

Class & Pathway Schedule “Check”

After scheduling your Pathway, check the Summary panel to verify the hours.

Remember that your total scheduled hours can be effected by any assigned calendars that have “No Class day” events.

Scheduling: Automotive Service Technology Pending 2

Instructor: Richard Herard
Enrollments: Currently no students enrolled.
Required Hours: 960 vs 1 Course totalling 60 Hours. !!> WARNING <<!!
Fixed Scheduling
Dates Friday, August 15, 2014 - Tuesday, December 30, 2014, Days -MTWTF-
Schedule: Automotive Service Technology has 98 Days for 588.00 Hours

NOT GOOD!

Scheduling: Medical Assistant

Instructor: Vickie Post
Enrollments: 32 Current Enrollments; (8) Pending, (24) Active, (17) Dropped, (36) Open Seats
Required Hours: 900 vs 21 Courses totaling 918 Hours. !!> WARNING <<!!
Fixed Scheduling
Schedule: 16F-D has 180 Days for 900.00 Hours. (10 Active Students)
Dates Monday, September 26, 2016 - Wednesday, September 20, 2017, Days -MTWT--

Much Better!

Schedule Daily View

The Daily View of each schedule is helpful when determining the amount of hours that have scheduled per month or week.

It also allow you to easily see when (the date) students are scheduled to have attended a certain number of hours.

Calendar View **Daily View**

Schedule: 17F-D

	Year	Mth.	Day	#	Start Time	End Time	Break Time	Class Time	Total Hours	Weekly Hours	#	Monthly Hours
<input type="checkbox"/>	2017	Sep	Mon	25	9:00 AM	2:00 PM	0	5:00	5:00	5:00	1	5:00
<input type="checkbox"/>	2017	Sep	Tue	26	9:00 AM	2:00 PM				10:00	1	10:00
<input type="checkbox"/>	2017	Sep	Wed	27	9:00 AM	2:00 PM				15:00	1	15:00
<input type="checkbox"/>	2017	Sep	Thu	28	9:00 AM	2:00 PM				20:00	1	20:00
<input type="checkbox"/>	2017	Oct	Mon	2	9:00 AM	2:00 PM				5:00	2	5:00
<input type="checkbox"/>	2017	Oct	Tue	3	9:00 AM	2:00 PM	0	5:00	30:00	10:00	2	10:00
<input type="checkbox"/>	2017	Oct	Wed	4	9:00 AM	2:00 PM	0	5:00	35:00	15:00	2	15:00
<input type="checkbox"/>	2017	Oct	Thu	5	9:00 AM	2:00 PM	0	5:00	40:00	20:00	2	20:00
<input type="checkbox"/>	2017	Oct	Mon	9	9:00 AM	2:00 PM	0	5:00	45:00	5:00	3	25:00
<input type="checkbox"/>	2017	Oct	Tue	10	9:00 AM	2:00 PM	0	5:00	50:00	10:00	3	30:00
<input type="checkbox"/>	2017	Oct	Wed	11	9:00 AM	2:00 PM	0	5:00	55:00	15:00	3	35:00
<input type="checkbox"/>	2017	Oct	Thu	12	9:00 AM	2:00 PM	0	5:00	60:00	20:00	3	40:00
<input type="checkbox"/>	2017	Oct	Mon	16	9:00 AM	2:00 PM	0	5:00	65:00	5:00	4	45:00
<input type="checkbox"/>	2017	Oct	Tue	17	9:00 AM	2:00 PM	0	5:00	70:00	10:00	4	50:00
<input type="checkbox"/>	2017	Oct	Wed	18	9:00 AM	2:00 PM	0	5:00	75:00	15:00	4	55:00
<input type="checkbox"/>	2017	Oct	Thu	19	9:00 AM	2:00 PM	0	5:00	80:00	20:00	4	60:00
<input type="checkbox"/>	2017	Oct	Mon	23	9:00 AM	2:00 PM	0	5:00	85:00			
<input type="checkbox"/>	2017	Oct	Tue	24	9:00 AM	2:00 PM	0	5:00	90:00			
<input type="checkbox"/>	2017	Oct	Wed	25	9:00 AM	2:00 PM	0	5:00	95:00			
<input type="checkbox"/>	2017	Oct	Thu	26	9:00 AM	2:00 PM	0	5:00	100:00	20:00	5	80:00
<input type="checkbox"/>	2017	Oct	Mon	30	9:00 AM	2:00 PM	0	5:00	105:00	5:00	6	35:00
<input type="checkbox"/>	2017	Oct	Tue	31	9:00 AM	2:00 PM	0	5:00	110:00	10:00	6	90:00
<input type="checkbox"/>	2017	Nov	Wed	1	9:00 AM	2:00 PM	0	5:00	115:00	15:00	6	5:00
<input type="checkbox"/>	2018	Sep	Mon	10				5:00	870:00	5:00	47	20:00
<input type="checkbox"/>	2018	Sep	Tue	11				5:00	875:00	10:00	47	25:00
<input type="checkbox"/>	2018	Sep	Wed	12	9:00 AM	2:00 PM	0	5:00	880:00	15:00	47	30:00
<input type="checkbox"/>	2018	Sep	Thu	13	9:00 AM	2:00 PM	0	5:00	885:00	20:00	47	35:00
<input type="checkbox"/>	2018	Sep	Mon	17	9:00 AM	2:00 PM	0	5:00	890:00	5:00	48	40:00
<input type="checkbox"/>	2018	Sep	Tue	18	9:00 AM	2:00 PM	0	5:00	895:00	10:00	48	45:00
<input type="checkbox"/>	2018	Sep	Wed	19	9:00 AM	2:00 PM	0	5:00	900:00	15:00	48	50:00

Weekly totals...

Monthly totals...

Variance Day indicator

Sum of total scheduled hours to date

This concludes your training exercise.

Calendars & Pathway Scheduling

This material presented here is brief look at some of the basic concepts and processes in setting up classes, as well as scheduling both classes and pathways.

Please practice setting up your own Pathways and scheduling them, along with your pathways (full-time programs). Let us know if you have any questions.

All processes shown and presented are subject to change without notice.

Reference Documents

OSB12 – Scheduling Additional Days Outside the Pattern

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