CIVICa

Timetabling Maintenance for School Officers



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Trainers use Datafile 2

1 Introduction

These Training Notes provide a reference during and following Civica Education's Timetable Maintenance for School Officers training. The Timetabling Manual provides a comprehensive guide to the software.

During training we will be working with fictitious data and all the exercises contained within this user guide refer to that data.

1.1 What is the Timetabling Module?

The Timetabling Module assists schools to produce and maintain a comprehensive timetable of teaching and learning programs using the information entered in the Administration and Timetabling modules. The system provides a comprehensive set of tools to manage the entry of student subject preferences, construction of grids, creation of school timetables and management of student courses and resource allocation.

The Timetabling module is one component of a suite of modules that comprise the School Information System. The Timetable module both draws information from and provides information to the other Integris modules including Administration Manager, Lesson Attendance and Transitional Reporting.



1.2 Training Program

Time		Content
8.30 am	12.30 pm	Coffee/Registration
8.45 am	12.45 pm	Introduction
		File Menu
		Help
		Administration Manager
		Staff Details
		Student Details
		Parameters
		Timetable Maintenance
		Student Course Maintenance
		Staff and Room Maintenance
		Operational and Maintenance Reports
10.15 am	2.15 pm	Morning/Afternoon Tea
10.30 am	0.30 am 2.30 pm Data Entry for Timetable Construction	
		Cohorts
		Course Promotion
		Student Preferences
		Data Validation Reports
11.45	3.45	Close

1.3 Training Outcomes

At the end of the training, participants will be able to:

- Enter Staff Details and make a staff member available to a timetable cycle
- Locate students' records
- Add and remove students from timetabling cohorts
- Add and edit timetabling parameters
- Add and change students' courses
- Add and change teachers and rooms allocated to teaching sets
- Produce Operational and Maintenance Timetabling Reports
- Create cohorts and add students to them
- Edit the Course Promotion Table
- Enter student preferences individually, in bulk and through course promotion
- Produce Data Validation Reports



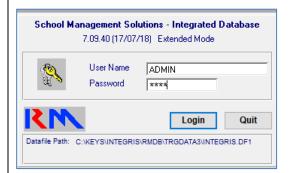
1.4 Logging On

Activity

• Double click on the *Integris* icon on your desktop.



- Type **ADMIN** into the **User Name** field
- Press < Tab>
- Type **keys** into the **Password** field



Click on Login, or press < Enter>

Note: In schools, each user has his or her own user name and password, which enables access to particular sections of the software as determined by the school administration.

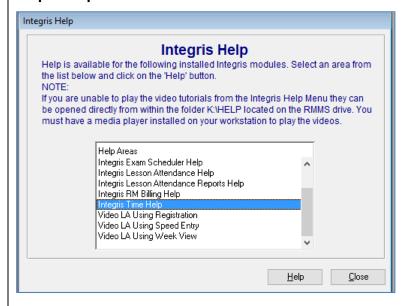
It is strongly recommended that you change your password regularly.



1.5 Help Contents and Index

Activity:

Help > Help Contents and Index



- Select Integris Time Help
- Click Help

The Timetabling Manual will be displayed.

- Scroll down to view the Table of Contents
- Close the *Help* window



2 Administration Manager

Administration Manager comprising of the Admin and General modules is the basis of the Integris software. Users of the Timetabling module will need to be aware of particular functions within the Administration Manager to be able to work effectively in the Timetabling module.

The functions or sections that relate to the timetable are:

- School Details
- Student Details
- Staff Details

Other areas that should be investigated are certain parameters that also impact on the timetabling process. These are:

- Faculties
- Departments
- Room Type
- Rooms
- Subjects
- Subject Area
- Subject Classification
- Subject Type

All of these functions and parameters will be discussed in greater depth over the next few pages.

This section only covers functions that are integral or necessary for a timetable to be maintained. If more information is required regarding other functions, attending the Administration Manager training program is recommended.



2.1 Using the Side Bars

Once you have logged onto the system a blank window with a control panel (side bar) appears on down the right-hand side of the screen. The General side bar is displayed.



The Administration module comprises of two sidebars. The one displayed on the left of this page is the **General** side bar. This provides access to the core functions. From here you can enter school details, view and enter student and staff details and create groups of students and staff.

It is also where schools set up their own parameters for the system and use the Control function to add new modules at a later date, and set up new users and passwords.

By clicking on the **Admin** tab on the bottom of the side bar a second bar is revealed over the General side bar. This is the **Admin** side bar provides an emergency report function, enables users to speed edit information in students' records, carry out Year End procedures and produce reports.

Other sidebars will be available dependent on your school and level of access.



2.2 Staff Details

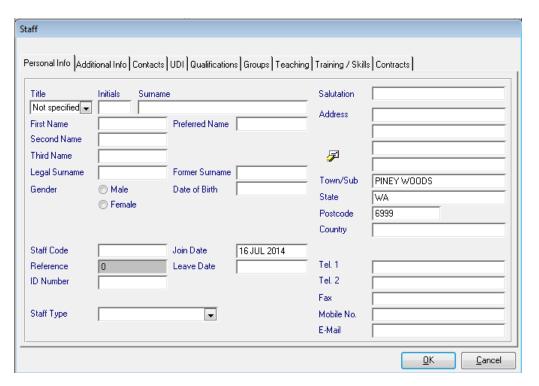
General > Staff Details

Administration Manager can hold details on both students and staff. The staffing section of the system is accessed via the Staff Details icon on the General side bar. Functionally it is very similar to the student window, using many of the same icons.

2.2.1 Entering Staff Details

General > Staff Details > Add

To add a new member of staff click Add. The following window will appear, enabling users to enter the relevant information.



Mandatory fields are:

- Surname
- First Name
- Gender
- Date of Birth
- ID Number
- Staff Code

It may also good practice to include:

- Title
- Staff Type
- TRBWA number (Teacher's Registration Board of WA for teachers)

To edit a staff member's details, display their record by either scrolling through or using the Find facility and then click on the Edit icon.



Activity:

General > Staff Details

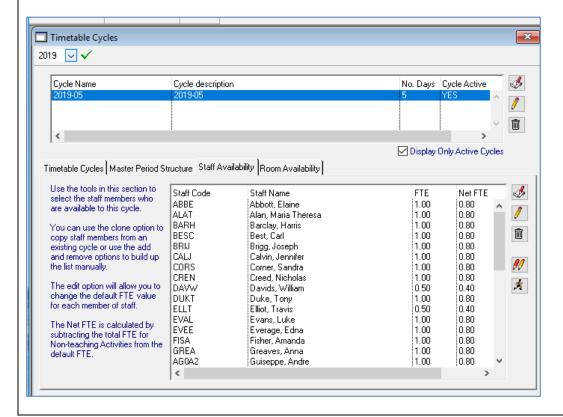
- Enter yourself as a new member of staff, complete the fields:
 - o Title
 - o Surname
 - First Name, Gender, Date of Birth
 - o ID Number
 - Staff Code
 - Staff Type
- On the UDI tab enter the TRBWA number

2.2.2 Making a new staff member available to the timetable

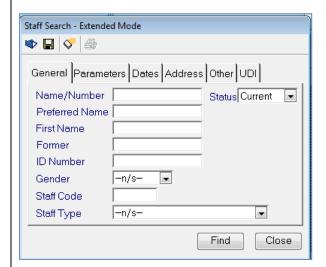
Activity:

Timetabling > Timetable Setup > Timetable Cycles

- Select the cycle for the current year
- · Click on the Staff Availability tab



- Click Add Staff Members
- Enter the first three letters of your surname in the Name/Number field and click *Find*



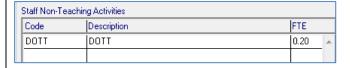
If necessary, highlight your name in the list and click Select

Edit your net FTE

Highlight your name and click Non-teaching Activities



- Click Edit Non-teaching Activities
- Enter a Code, Description and FTE



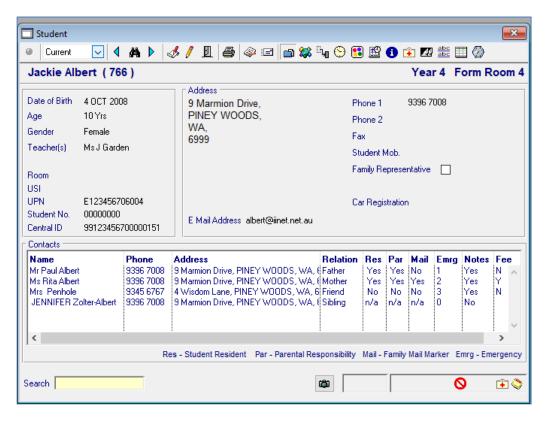
- Click **OK** and **Close**
- Close Timetable Cycles and Timetable Setup



2.3 Student Details

General > Student Details

Student Details display comprehensive information about each student attending the school. From the General side bar choose Student Details. The following window will appear:



This is the summary window and displays the basic student data and a photograph of the student (where available).

Photos are accessed by clicking on Display Student Photograph at the bottom right-hand corner of the window.



Student Details Toolbar

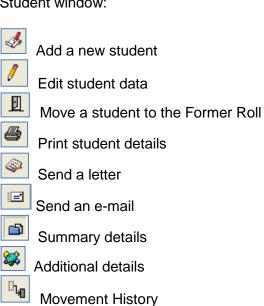


This drop-down menu enables the user to decide which of the rolls they wish to view: the Admissions Roll, Current Roll, or the Former Roll.

The **Next Student** and **Previous Student** arrows on either side of the binoculars allow you to scroll through the database either forward or backward in alphabetical order.

The **Find Student** tool enables users to find individual students or groups of students based on selected criteria.

To view specific areas of a student's record, use the buttons on the tool bar at the top of the Student window:



Attendance History

Student Activity

Medical Details

Teaching Sets

Miscellaneous details

Student timetable

User-defined Information

Groups

Student Status Bar

Cohorts



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The Student Status Bar is designed to be visible from all panes of the window, giving users a view of key student indicators at a glance.

The Status Bar is split into two sections, with the left-hand section reserved for more sensitive data. In both sections, information on the current student is displayed using icons. Hover the pointer over an icon and it will display a description of its meaning.

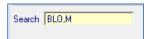
Normal Bar Student has a flagged medical condition Language Background other than English Access restriction Part-time student Accepted (Admissions Roll) Student Notes Name Change



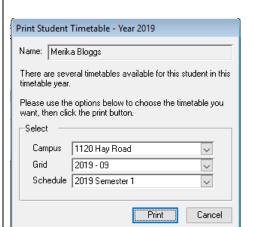
Activity:

General > Student Details

Find Merika Bloggs



Click Print Student Timetable

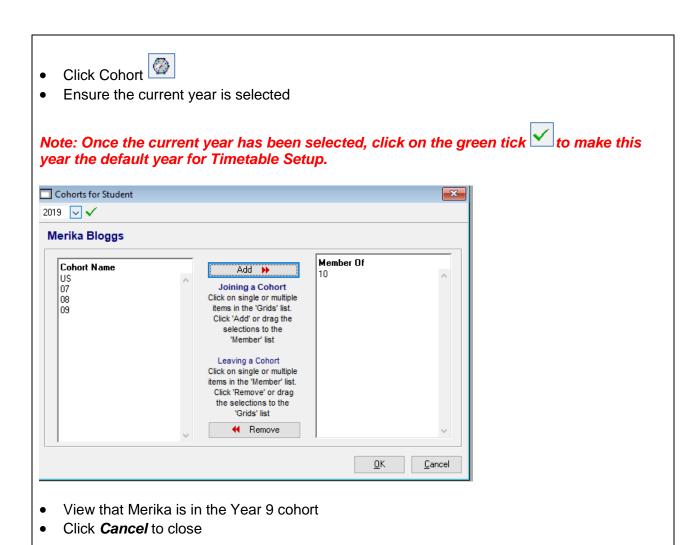


- Click Print
- Click **OK** to print to screen
- View then close the report

Note: There is an early lunch and early finish on Thursdays.

Cancel the Print Timetable window





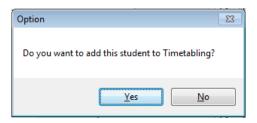
2.3.1 Entering a new student's details

General > Student Details

Students can also be entered into the Current, Admissions, Former or External rolls by selecting the appropriate roll and clicking Add Student.

The minimum information the system requires is Surname, First Name, Date of Birth, Reference Number (automatically generated if Auto Number is selected in Control > Preferences > Defaults) and Entry Date. Any other information can be added at a later date by editing the record.

Where Timetabling is also loaded, the following window will appear at the conclusion of the Add Student process:



Click **No** for primary students and **Yes** for secondary students where the Timetabling module is being used and allocate the students a cohort. This prompt does not appear when adding students



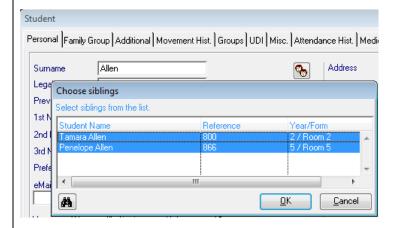
to the Admissions Roll. The timetabler may place children on the Admissions Roll into a cohort via Timetabling > Timetable Setup.

Activity:

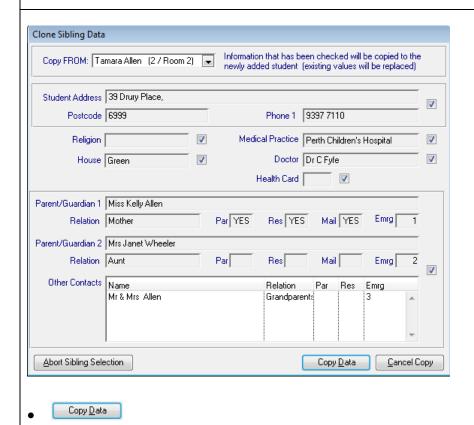
General > Student Details

David Allen has transferred from another school. Add his details to the Current Roll with today as the Entry Date. We will be able to copy much of his data from his sisters' records.

- Click Add Student
- Type Allen and <Tab>

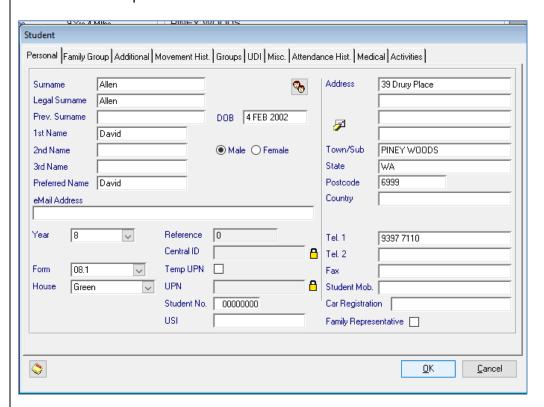


Highlight Tamara and Penelope Allen and click OK

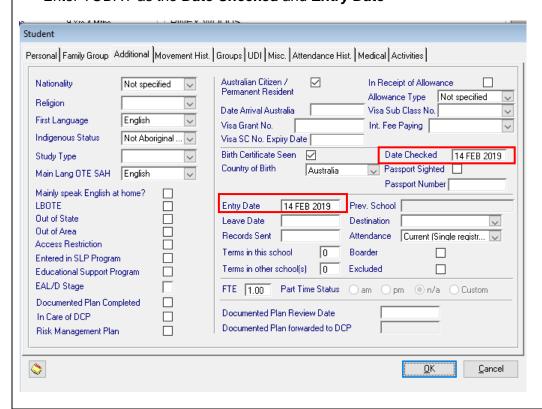




Enter David's personal details



- On the Additional tab, check Permanent Resident and Birth Certificate Seen
- Enter Australia as the Country of Birth
- Enter TODAY as the Date Checked and Entry Date



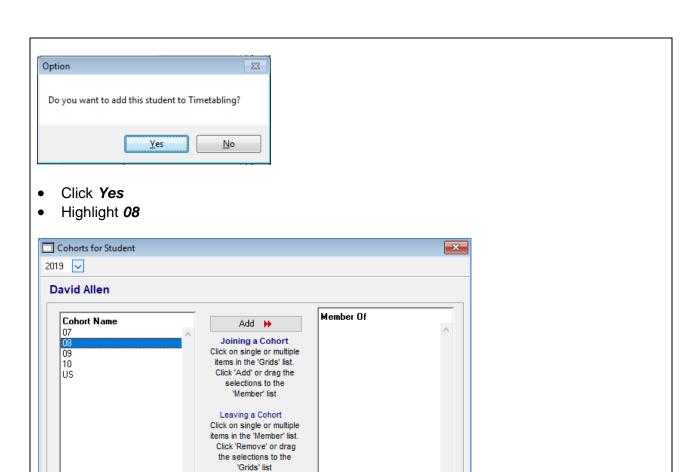


On the *Misc* tab, **Enter Immunisation Details** Personal Family Group | Additional | Movement Hist. | Groups | UDI | Misc. | Attendance Hist. | Medical | Activities | Disabilities Information Detail ~ \vee Other Disability Detail ~ \sim Other Disability Detail Click here for information about funding for students with disability Immunisation Details Evidence provided Date Checked 14 FEB 2019 -Measles Vaccination Diphtheria, Tetanus and Pertussis Vaccinations MMR (1st dose at 12 months) DTPa (Immunisation completed to school entry <u></u> MMR (2nd dose at 4 years) DTPa (Year 7) ₽ Date of last Tetanus vaccination Measles Exclusion \checkmark Other Information RI Withdrawn Religion ~ Repeating Current Year Visa Sub Class No.

Click OK

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<u>C</u>ancel



<u>0</u>K

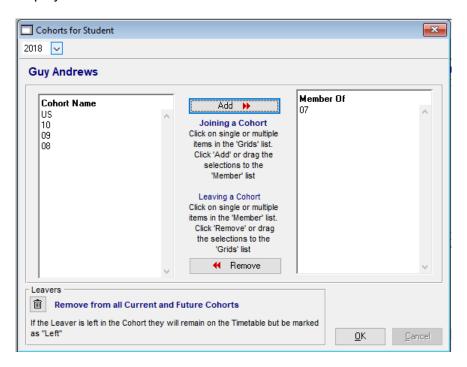
 $\underline{C}\text{ancel}$

← Remove

- Click
 Add
- Click OK

General > Student Details > Move Student to Former Roll

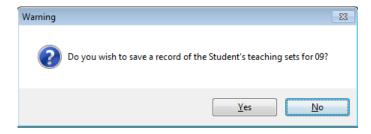
If a student is moved to the former roll, and Timetabling is installed, the following window will be displayed:



Typically, schools will want to remove timetabled students from cohorts or they will continue to be displayed on teaching set lists (although marked as "left"). There are two ways to remove students from cohorts in this window:

- Highlighting the cohort(s) displayed in the *Member Of* pane and clicking *Remove*
- Clicking Remove from all Current and Future Cohorts

The second option Remove from all Current and Future Cohorts is recommended, as this will enable the option to keep a record on the student's preferences and teaching sets.





Activity: General > Student Details Search BLO,M Use Search to locate Merika Bloggs Click Move Student to Former Roll Warning 23 Are you sure you want to move this record to the Former Roll? <u>Y</u>es <u>N</u>o

- Click Yes
- Enter her Leave Date as TODAY, her destination Northern Territory and her Reason for Leaving as Interstate



- Click OK
- Click Yes, you do want to move the student from his groups
- Click **OK** to the default date for changing the roll status

Note: Daily records for Lesson Attendance have only been created until the end of the term for training purposes. In schools, daily records should be created daily.

Click Remove from all Current and Future Cohorts





- Click **Yes**, you do wish to save a record of the student's teaching sets
- Close Student Details

Note: Using Remove from all Current and Future Cohorts, instead of Remove, gives users the option to create a record of the leaving student's current subjects and teaching sets.



2.4 Parameters

General > Parameters

Parameters enable the user to define a list of acceptable options that will be available when data is entered. Appropriate use of parameters will enable the timetabler to search, sort and print data relevant to the school's structure. It is recommended that parameters are locked once they are set.

The following parameters will be useful to the Timetabling Module. Schools may need to set up some or all of the parameters below.

Departments provide a secondary organizer for school activity and can be physical or logical entities. For example, an Arts faculty may contain Art and Drama departments. Departments can be linked to a faculty but the use of faculties is not mandatory. *This is a mandatory parameter for timetabling purposes.*

Room Types define the different categories of rooms available in the school, for example Science Labs, Art rooms, Classrooms etc. These rooms can be linked to specific subjects. While the Room Types parameter is not mandatory for timetabling, it is very useful and users are recommended to take advantage of it.

Rooms define the actual individual rooms available within the school. The user must enter in all rooms of the school if rooms are to be listed on the timetable. *This is a mandatory parameter for timetabling purposes.*

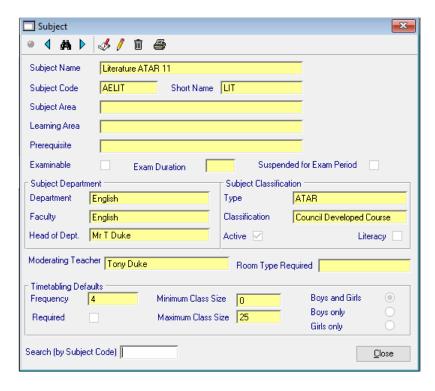
Subject Classifications are ways of identifying subjects for Schools Curriculum and Standards Authority purposes, for example Council Developed Course or Workplace Program. While this parameter is not mandatory for timetabling, it is **essential for reporting to the School Curriculum and Standards Authority.**

Subject Types are ways of identifying subjects for Curriculum Council purposes, for example Course of Study or Endorsed Program. While this parameter is not mandatory for timetabling, it is essential for reporting to the School Curriculum and Standards Authority.

Note: Only subjects with the type ATAR, General, VETCOS or CEP will be included when reporting to the School Curriculum and Standards Authority.

Subjects may define an individual subject for example, English or the components of courses offered by the school. They will contain the default values such as class size, frequency etc. *This is a mandatory parameter for timetabling purposes.*





It may not be necessary to use all of the fields for all subjects. Fields which should be entered are:

- Subject Name
- Subject Code
- Short Name

Note: For Courses the Short Name should be the three-digit Course code.

- Department, which will also load Faculty and Department Head if these have been entered in Department
- Frequency
- Maximum Class Size

For Schools Curriculum and Standards Authority accredited subjects, other necessary fields are:

- Subject Type
- Subject Classification
- Moderating Teacher (Contact Teacher in the Subject Register)

Timetabling defaults should be entered here. They can be edited in the Timetabling module but global parameters are entered here.

All Parameters may be added or edited, printed, locked, made active or inactive and/or made the default parameter.

The parameters to be created need to be set up in the preceding sequence.

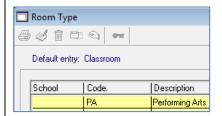


Activity:

General > Parameters > Room Type

The school has recently acquired a Performing Arts Centre. Enter as a new room type.

- Right click on the yellow pane
- Select Add/Edit Parameters
- Enter a Code and Description

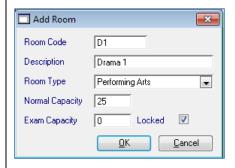


- Click OK
- Highlight Performing Arts and Lock and Yes
- Click Close

General > Parameters > Rooms

Add two Performing Arts rooms.

- Click Add
- Enter the following details and click OK



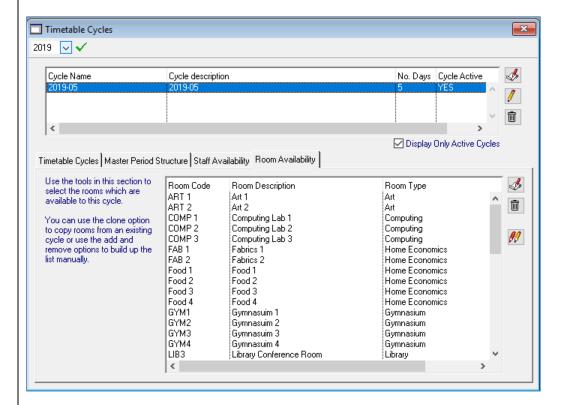
- Highlight *DI* and click Copy
- Enter details for D2
- Close Rooms and Parameters



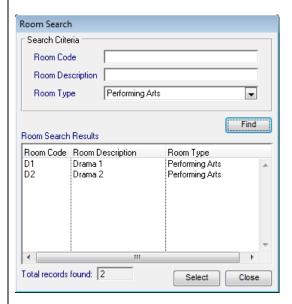
To make the new rooms available to the current timetable:

Timetabling > Timetable Setup > Timetable Cycles

- Select the Room Availability tab
- Ensure the current year is selected



- Click Add Rooms
- Select by Room Type: Performing Arts and click Find



- Click Select and Yes
- Close Timetable Cycles and Timetable Setup



3 The Timetabling Module

The Timetabling Module must perform two important functions. It must facilitate the creation of a timetable, which satisfies the educational requirements of the school, and also provide an environment for the efficient day-to-day maintenance of the timetable.

This course will examine the functions available for the maintenance for an existing timetable and then look at the processes required to construct a timetable.

3.1 Using the Timetabling Sidebar



The Timetabling sidebar allows users to set up, create and maintain the school's timetable for current and future years.

Student Course displays for each student a list of preferences, the student's timetable and the relevant grid for the student with his or her teaching sets highlighted.

Timetable displays the current whole school timetable that may be filtered by year, cycle, schedule, grid or department.

Grid Modelling allows the user to either manually manipulate the grid or define constraints and use the auto-scheduler to model the grid or a combination of both.

Preferences refers to the entry of student's subject preferences which may be entered either on an individual or group basis.

Reports allows the user to access a list of timetable reports divided into three main areas: Data Validation Reports, Planning and Preparation Reports and Operational and Maintenance Reports.

Timetable Set-up allows the user to define all aspects of the timetable prior to creation of a new timetable. Timetable set up can be completed at any time for future timetables.

Data Entry allows the user to make future Subject recommendations for existing students.



3.2 Timetabling Terminology and Concepts

The **TIMETABLE** is a tool that enables the resource needs of the school to be managed. A school's timetable is a plan of the student's time, which indicates the subject being studied, its location, the teacher taking the class and the frequency of the subject. The subject choices of students need to be satisfied within the constraints imposed by the limited resources of teachers and rooms.

The **TIMETABLING YEAR** holds all of the school's timetabling activity within the school year. Integris will store past, present and future timetables enabling users to move between timetables. Within a timetable year, a **CYCLE** contains information regarding Cycle dates and period structures drawn from the school calendar and connects with the Lesson Attendance module. Cycles can be defined for each logical or physical **CAMPUS**. Students grouped together for timetabling reasons are identified as a **COHORT** and students may belong to multiple cohorts.

GRIDS are the focus of timetabling activity and can be created or cloned from previous years. All Staff, rooms and subjects can be made available or unavailable, where required, to a grid. The grid provides the framework within which the teaching sets required to satisfy the selections of students within the grid will be placed.

Grids are made up of **BANDS**, which are similar to gridlines, but are divided up into **BAND RECORDS**. Band records can be individually manipulated and ultimately represent a single occurrence of that combination of teaching sets on the timetable.

Student **PREFERENCES** (subject selections), as well as reserve preferences, may be allocated, individually or in bulk, selected from groups or promoted from the previous year.

Grids may be created manually or by using the **AUTO-SCHEDULER** or using a combination of the two to add some fixed elements. The auto-scheduler can consider a wide range of constraints when determining the optimal solution.

Grid manipulation is referred to as **MODELLING**, and a comprehensive set of tools is available to assist with the modelling process from horizontal and vertical representations of the grid. Modelling can be used to construct a grid manually, as in Fixed Grid schools or to manipulate the output from the auto-scheduler.

Grids are assigned to one or more **SCHEDULES**. Schedules have a defined period of activity and a **TIMETABLE** will be a combination of all events active at a particular time.

Each period of time for which the timetable remains unchanged is known as a **TIMESLICE**. The timeslices required by the timetable are calculated automatically by the system by examining each of the schedules linked to grids.

The timetable applicable to any date during the year can be selected by choosing the appropriate timeslice from a list of date ranges provided.

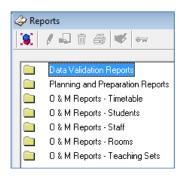


3.3 Maintaining the Timetable

Once the timetable has been created it may be necessary over its life to make changes. The changes may take the form of staff and/or student movement, new subjects and/or old subjects being dropped, and rooms may become available and/or unavailable for a variety of reasons. The timetabling module is flexible enough to be able to take these changes into account in an operating timetable.

There are Operational and Maintenance reports for:

- The Timetable
- Students
- Staff
- Rooms
- Teaching Sets



Maintaining the timetable has been broken into three areas to make it easier for the user to follow the necessary steps:

- Student Course Maintenance
- Staff and Room Maintenance
- Grid Changes

3.1.1 Course Change Recording

Timetabling > Timetable Set-up > Set Course Change Recording for all Students

It is possible to turn on, or off, Course Change Recording for all students for an entire year.

Note: It is recommended that Course Change Recording is not turned on globally until all grids for a given year are completed.

Course Change Recording may also be turned on or off for individual students in Student Course.





Activity:

Timetabling > Timetable Set-up > Set Course Change Recording for all Students

- Click Edit
- Select ON



Click OK

Course Change Recording is enabled.

Close

Note: It is recommended that Course Change Recording is not turned on globally until all grids for a given year are completed. Course Change Recording may also be turned on or off for individual students in Student Course.





3.1.2 Student Course Maintenance

Timetabling > Student Course

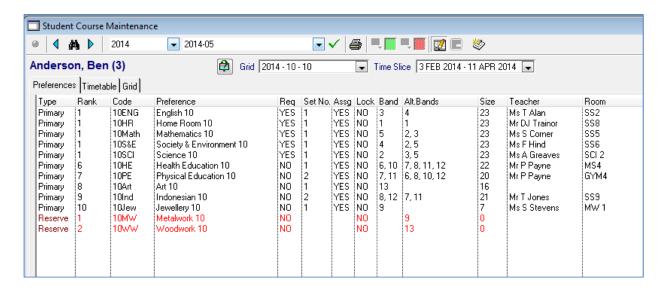
There are a number of reasons to update the timetable once it has been produced:

- New students may enrol during the school year and need to be entered onto the timetable
- Students may leave the school and may be deleted from the timetable
- Students may alter their courses after the new timetable is operating
- New subjects may be introduced and students may wish to change their course to take the new subject
- Teaching Sets may be split or collapsed and students will need to alter their course

Student course maintenance functions are performed within the Student Course sidebar. The course for each student is presented in three views. These are:

- Preferences
- Timetable
- Grid

Each view will allow the entry and editing of the student's course and will have advantages in different circumstances. The *Timetable* view will only be available when the grid of which the student is a member has been saved to the timetable.

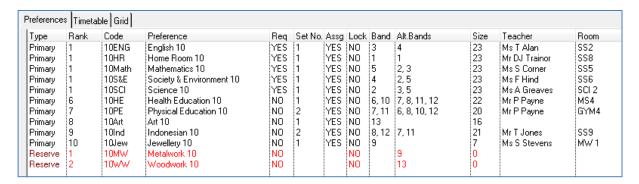


Switching on Course Change Recording will display a further icon that will enable the user to *View or Print the Course Change History*.



Preferences View

The **Preference** view lists the teaching sets that the student has been allocated to and the grid bands where these have been placed. Any preference that has not been assigned to a teaching set will be highlighted in red and have **NO** in the **Assign** column.



Deleting Preferences

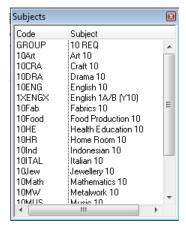
- Highlight the appropriate preference and click on Delete
- Confirm your selection

Adding Preferences

Preferences can be added by dragging and dropping from the subject selector or by keyboard entry.

To use the subject selector:

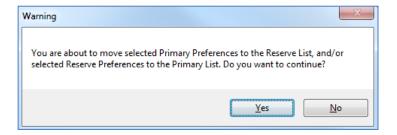
- Click on Show/Hide Subject List
- Click and drag the desired preference from the Subjects table and drop into the white area of the preference window





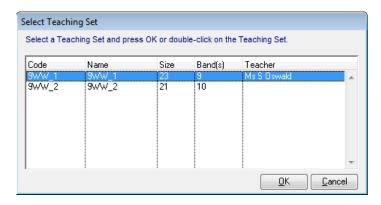
Allocating/Promoting Reserve Preferences

- Highlight the appropriate Preference
- Click on the Toggle button
- Confirm your action.



Fitting Students into existing Teaching Sets

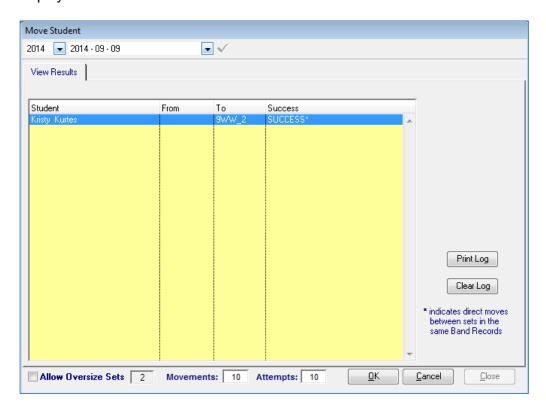
- Highlight the unassigned preference
- Click on Assign Teaching Set
- Select a Teaching Set and click OK



Note: If the teaching set cannot be assigned due to a conflict, a warning message will be displayed.



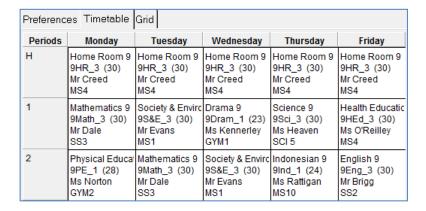
Alternatively, Suggested Student Fit button may be used. The following screen will be displayed.



The Suggested Fit may be saved or discarded.

Timetable View

The *Timetable* view displays the selected student's course within the grid and timeslice selected.



Right clicking on a period presents a number of options to manipulate the student's course. These options are:

- Show Teaching Set Members
- Show Available Sets presents alternate teaching sets available at this time
- Remove Student removes the student from the set

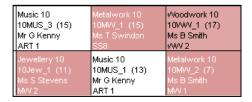


Note: Changing a student to a new subject within the timetable view does not delete the original subject. If necessary, this can be deleted or marked as a reserve in the preference view.

Grid View

Grid view presents the selected students course overlayed onto the grid. Clicking Colour enables the display of Department colours.

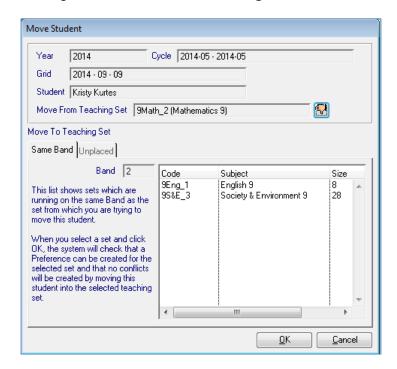
Note: Department colours are assigned in Timetabling/Timetable Setup/Department Colours.



In this example, colour been assigned to the D&T department. The text and background colour vary according to whether or not the student is in the class. This student is in 10WW_1.

Right clicking on a populated cell enables the student to be removed or moved to an alternate teaching set. A band or band record to which the student is not fitted is highlighted and the student can be added to a selected teaching set.

The **Move Student** function will display a window that will allow users to move the student between teaching sets on the same band or remove the student from their current teaching set by clicking on the **Move From Teaching Set**.





Note: Changing a student to a new subject within the grid view does not delete the original subject. If necessary, this can be deleted or marked as a reserve in the preference view.

New Students

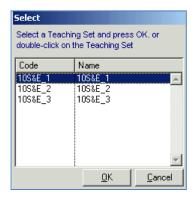
As new students are added to Integris, the user will be prompted to include the student in an existing cohort. The user must include the student in at least one cohort to add the student to the timetable. Once the student has been entered into the cohort, the student must be assigned subject preferences. Preferences may be entered in one of two places: Timetabling > Preferences or Timetabling > Student Course.

The **Student Course** window displays the student's subject preferences, their individual timetable and the relevant grid with the student's teaching sets highlighted. Selecting **Student Courses** from the Timetabling sidebar will display the **Student Course Maintenance** window.

For a new student, the preference screen will be blank and subject preferences may be entered in the same way as described earlier.

After the preferences have been added, the student must be added to existing teaching sets. This may be done in one of two ways:

• Manually, by highlighting the subject, clicking the Place in T-Set button appropriate teaching set from the list displayed



• Automatically, using Generate Suggested Fit icon from the **Student Course** screen, which will place the student in acceptable teaching sets if it can do so without clashes

Once the student has been added in either way to teaching sets, the student will now have a timetable which will be shown in Timetabling > Student Course > Timetable.

A student's course may also be entered within the *Grid* or *Timetable* views.

Leaving Students

Students who leave the school may be removed from the current timetable. Moving a student to the former roll will prompt the user to remove the student from any cohorts. Once students are removed from their cohorts they are removed from the timetable. Users do have an option to leave students in their current cohorts and they will remain in their teaching sets, but will be highlighted in red to show they are no longer current students.



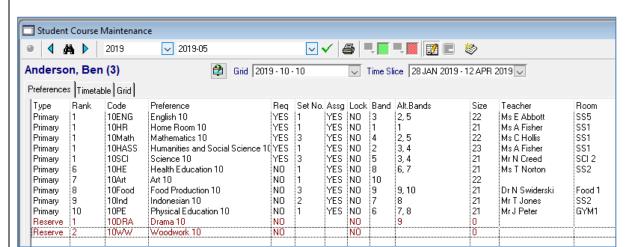
Change of Course

Students may alter their subject selections after the current timetable has begun operating. The student must be deleted from current teaching sets and their preferences must be altered to reflect their new course. The student then needs to be placed in the new teaching sets as discussed above for new students.

Activity:

Timetabling > Student Course

- Use Search to locate **Ben Anderson's** records
- View his course on the **Preferences** tab

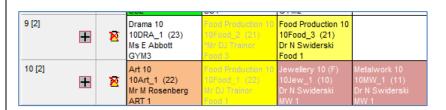


- Select the *Timetable* tab
- Ben's timetable to the screen, then close
- View his course on the Grid tab
- Click Toggle Student Placement/Department Colour



Search AND,B

Note: Department colours are assigned in Timetabling/Timetable Setup/Department Colours.

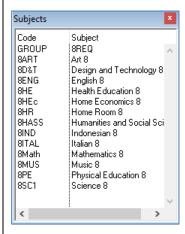


Colours have been assigned to the Design and Technology (D&T), Art and Home Economics departments. The text and background colour vary according to whether or not the student is in the class. Ben is in 10JFood_3 and 10Art_1



David Allen is a new student and has been added to the Year 8 cohort. Enter his preferences.

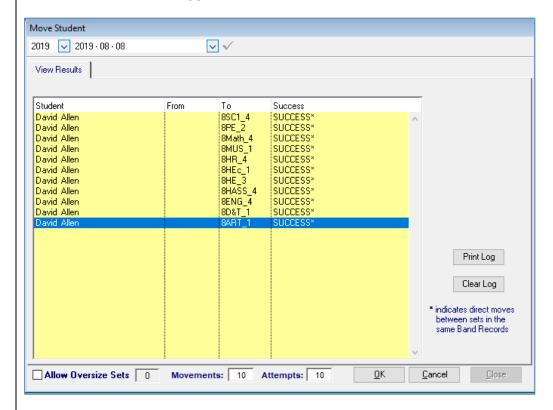
- Find **David's** records
- Return to the *Preferences* tab
- Click Show / Hide Subject List (Hint: Bottom right of screen)



- Drag and drop the Subject Group **8REQ** onto the white screen
- Close the **Subject** box

Allocate David to a Teaching Sets

Click on Generate Suggested Fit for Student



- Click OK to save and accept the suggested fit
- Close the Move Student window

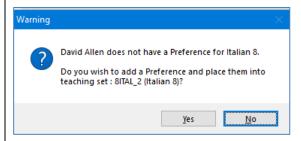


• Click on the Grid tab

Each of the grid band where David does not have preferences are highlighted in red.

Right click in the cell containing 10ITAL_2 and click Add Student





- Click Yes
- Click on the *Timetable* tab and view David's timetable
- Print David's timetable to the screen

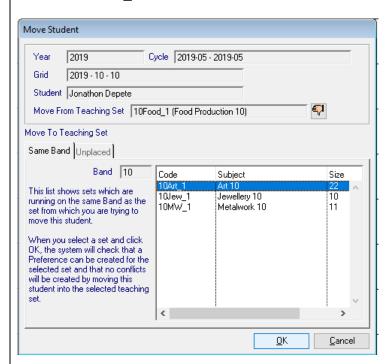
Jonathon Depete is moving from Drama to Art.

- Find Jonathon Depete's records
- Click on the Grid tab
- Right click in Jonathon's Food class on Band 10 and click Move Student

Search DEP,J



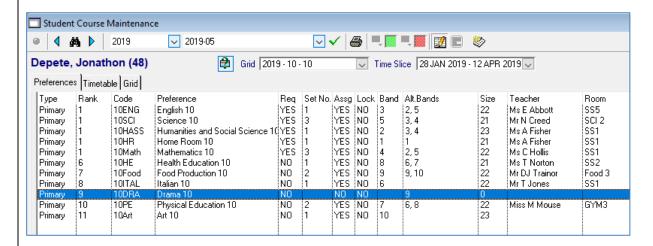
• Select 10Art 1 and click OK



- Right click on 10DRA_1 on Band 9 and click Move Student
- Select one of the Food classes and click OK
- Click on View/Print Course Change History and print to the screen
- Close the report



Click on the Preferences tab



Highlight 10DRA Drama 10 and Delete and Yes

Note: When students change courses, it is important to toggle to reserve or delete the subject that they have dropped; otherwise they will be billed for both the old and new subject.



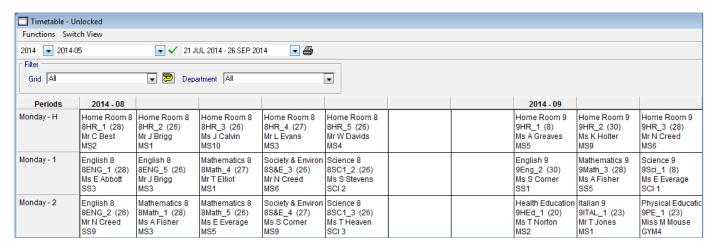
3.1.3 Staff and Room Maintenance

Timetabling > Timetable

Maintenance of Staff and Room timetables may be necessary from time to time due to staff turnover or leave and/or the addition or restricted use of rooms for whatever reason.

Allocation and maintenance of staff and room details is performed within the *Timetable* sidebar function. Selection of this function will open the timetable that applies to the current date. The timetabling year and timeslice can be selected to view the timetable to be staffed and roomed.

Only grids that have been saved as Timetable will be visible.



The **Period Summary** view provides a period-by-period view of the total timetable activity.

The appropriate component of the timetable is selected using the *Timetabling Year* and *Timeslice* selections.

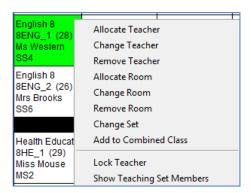
The Timeslice is calculated by the system following examination of grids and schedules as a period of time that the timetable will operate unchanged.

The **Period Summary** view can be filtered to show activities associated with an individual grid or subjects linked to a department.



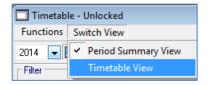
Manual Placement or Editing of Staff and Rooms

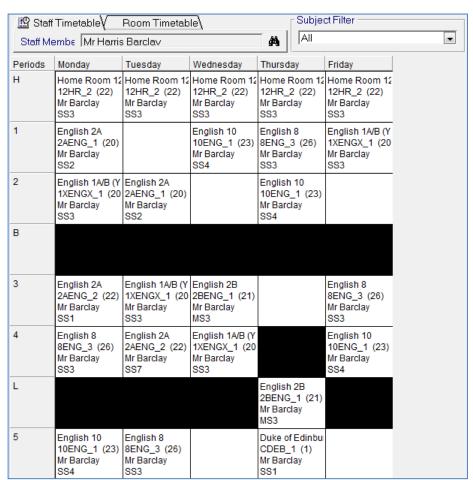
Manual placement or editing of teaching staff and rooms are allocated by highlighting an appropriate teaching set, right clicking and selecting from the list of functions.



Switch View

The **Switch View** function enables the timetable for a teacher and room to be displayed.







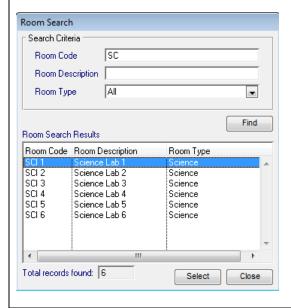
Activity:

Timetabling > Timetable

• Filter to the *English* department



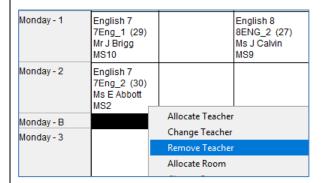
- Switch View to Timetable View
- Click on the **Room Timetable** tab
- Click on , type SC in the room code and click Find
- Highlight SCI 1 in the results window and click Select



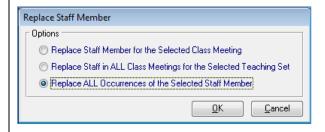


Elaine Abbott is going on long service leave. Allocate a suitable member of staff to take her classes.

- Switch View to Period Summary View
- Right click on Elaine's 7ENG_1 class
- Click Change Teacher

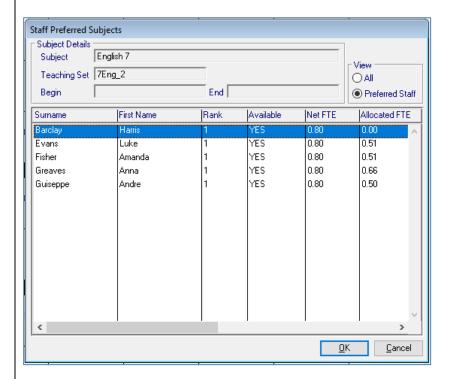


 Select the third option – Replace ALL Occurrences of the Selected Staff member- and click OK





Highlight Harris Barclay and click OK



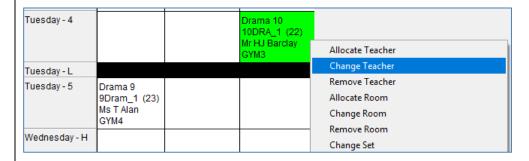
- Switch View to Timetable View and select Staff Timetable tab
- Find Harris Barclay's timetable

The Drama classes can now be located in the new Performing Arts rooms.

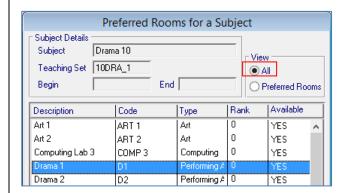
- Return to Period Summary View
- Filter to the *Drama* department



- Scroll down to find a Drama class and right click on first occurrence of that class
- Click on Change Room



- Select Replace Room for the Selected Teaching Set and click OK
- Click the All radio button
- Select a Drama room



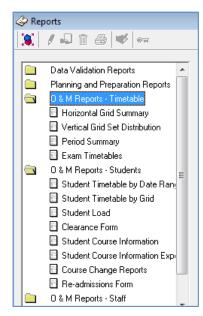
- Click OK
- Repeat for the other Drama Teaching Set

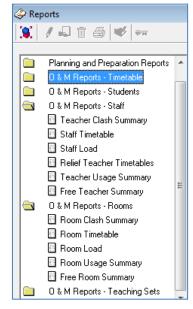


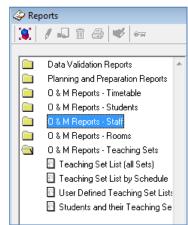
3.2 Operational and Maintenance Reports

Timetabling > Reports

Timetabling reports are located within the Report sidebar option.







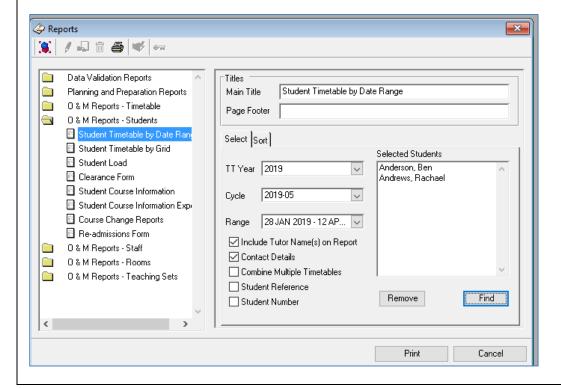
Operational and Maintenance reports are of greatest use once the timetable is operational. There are Operational and Maintenance reports on:

- Timetable
- Students
- Staff
- Rooms
- Teaching Sets

Activity:

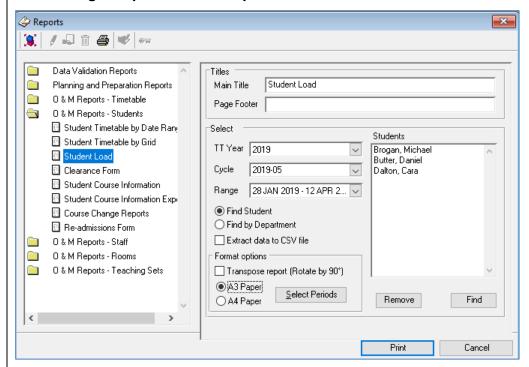
Timetabling > Reports > O&M Reports - Students > Student Timetable by Date Range

- Find Rachael Andrews and Ben Anderson
- Check Include Tutors Name(s) and Contact Details
- Deselect Combine Multiple Timetables
- Print the report to the screen





Timetabling > Reports > O&M Reports - Students > Student Load

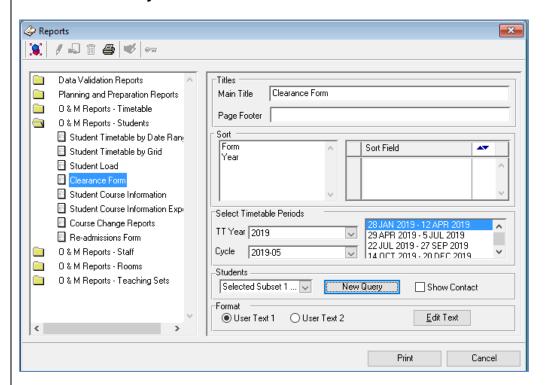


- Find some students in Year 12
- Select A3 Paper
- Print to the screen
- Check Extract data to CSV file
- Print
- Select **Desktop** and click **Save**
- Click OK
- Double click on Student Load on your desktop
- View then close

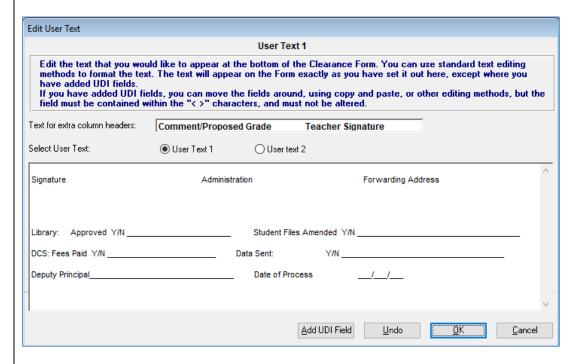


Timetabling > Reports > O&M Reports - Students > Clearance Form

- Select the current term
- Click New Query to find Rachael Andrews



Click Edit Text and edit to reflect the practice in your school

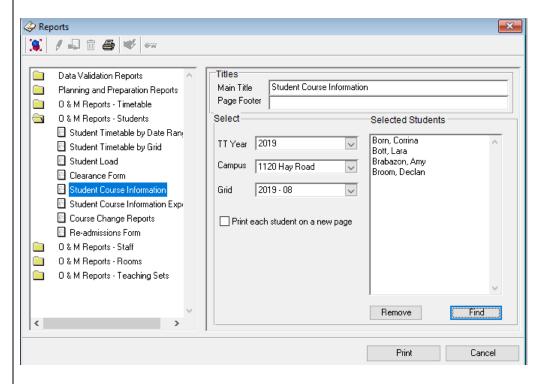


• Print the report to the screen



Timetabling > Reports > O&M Reports - Students > Student Course Information

Find some students in Year 8

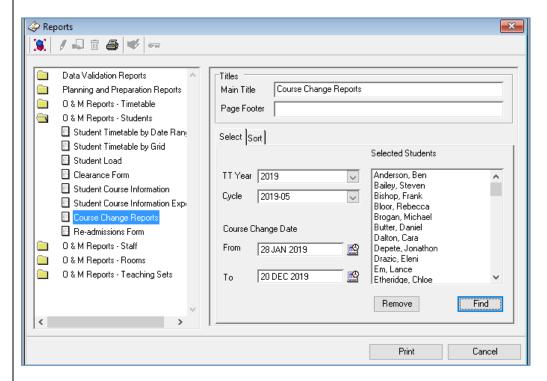


• Print to the screen

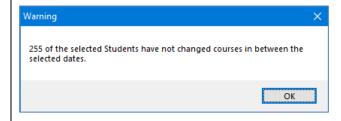


Timetabling > Reports > O&M Reports - Students > Course Change Report

- Find all students
- · Leave the date range as displayed



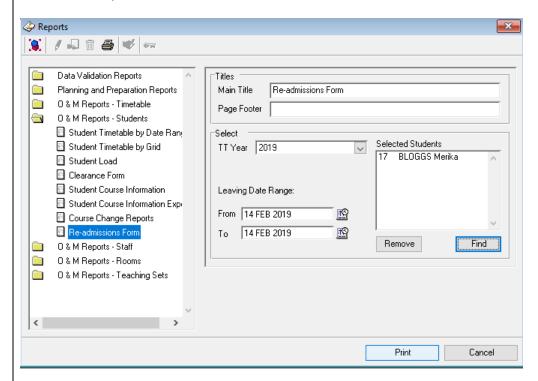
Print the report to the screen



• Click **OK** twice

Timetabling > Reports > O&M Reports - Students > Re-admission Form

- Leave the date range as TODAY
- Click Find, OK and Yes



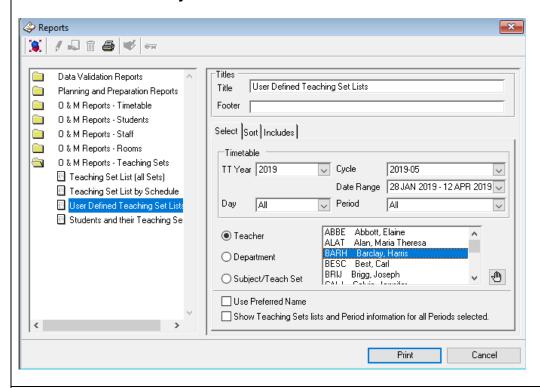
• **Print** the report to the screen

Note: This report will only be available in the reports menu if students have been moved to the former roll during the selected Timetable Year and Leave Date range using

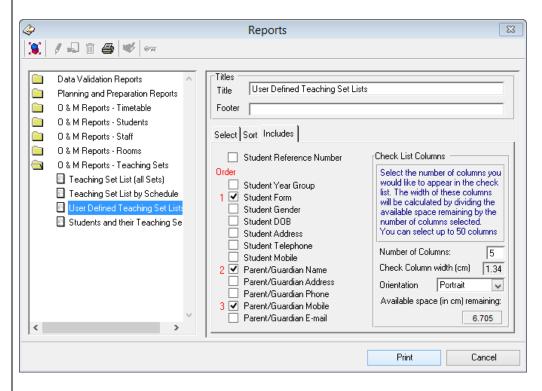


Timetabling > Reports > O&M Reports - Teaching Sets > User Defined Teaching Set Lists

Select Harris Barclay



- Click the *Includes* tab
- Check Student Form, Parent/Guardian Name, Parent/Guardian Mobile
- Enter 5 in Number of Columns



Print the report to the screen



Go back to the Select Tab and repeat for a Teaching Set Reports 🧝 / 🎝 🕆 🞒 💗 🦛 Titles Data Validation Reports Title User Defined Teaching Set Lists Planning and Preparation Reports 0 & M Reports - Timetable Footer 0 & M Reports - Students Select Sort Includes 0 & M Reports - Staff O & M Reports - Rooms -Timetable O & M Reports - Teaching Sets TT Year 2019 2019-05 Teaching Set List (all Sets) Date Range 28 JAN 2019 - 12 APR 2019 V Teaching Set List by Schedule Period Day All All User Defined Teaching Set Lists Students and their Teaching Se 10Art - 10Art_1 O Teacher 10ENG - 10ENG_1 10ENG - 10ENG_2 O Department 10ENG - 10ENG_3 4 Subject/Teach Set Use Preferred Name Show Teaching Sets lists and Period information for all Periods selected. Print Cancel



Print the report to the screen

3.3 Review 1

Activity

Note the pathway you took to complete each of the following tasks

- 1. Steven Bailey (Year 10) has decided he wants to do Indonesian instead of Italian. Change his course. (Hint: This swap will require his PE classes to be swapped as well. There may also be billing implications).
- 2. Peter Payne is taking over Home Room Class (11HR_1) from Mr Fisher. Make the necessary changes in the timetable. (Hint: View should be Period Summary View and the Upper School US Grid)
- 3. Move Ms Fisher's Year 11 Geography class (AEGEO_1) to Library on Mondays only. (Hint: the Library is not a preferred room for Humanities.)



3.4 Data Entry for Timetable Construction

The Timetabling module will allow users to create and maintain timetables for students, staff and rooms for multiple campuses and period structures as required. It is a logical tool for staff to explore the best possible timetable given the resources of the school.

3.4.1 Constructing the Timetable

Construction of the timetable may be broken down into the following stages of development.

Please note that not all of these steps are necessary, as different schools will have different timetabling needs. Mandatory steps are indicated with an asterisk. *

General > School Details

- Set up Timetabling Year *
- Define Timetable Periods *
- Setting Parameters
 - Campuses

General > Parameters

- o Faculties
- Departments *
- Room Types and Rooms*
- Subject Areas, Classification and Type, and Subjects *

Timetabling > Set Up

- Campuses
- Define Cohorts *
- Staff Preferred Subjects
- Subject Preferred Rooms
- Course Promotion Table
- Period Types
- Define Cycle
 - o Add a Cycle *
 - Master Period Structure *
 - Staff Availability *
 - Room Availability *
- Define Grids
 - Grid Cohort of Students *
 - Grid Period Structure *
 - Grid Subjects *
 - Grid Subject Groups
 - o Grid Rooms
 - o Grid Staff



Timetabling > Preferences

- Student Preferences *
 - Individual Entry
 - Bulk Entry
 - o Promote Student Courses
- Subject Load Table *
 - o Edit
- Manual Teaching Set Allocation

Timetabling > Grid Modelling

- Grid Modelling *
 - Manual Set Allocation to Grid
 - Enter Constraints
 - o Inter-grid Constraints
 - o Auto-schedule Process
- Refining Student Placement *
 - o Fit unplaced students
 - Balance sets
- Map time slots to teaching periods (Functions>Timeslot Mapping) *
- Save grid to the timetable (Functions>Save As Timetable) *

Timetabling > Timetable

- Allocate Staff and Rooms *
 - Manual allocation
 - Auto allocation
- Lock Timetable

In this course, we will work on only parts of this process.



1.1.2 Cohorts

Timetabling > Timetable Set-up > Cohorts

A cohort is a group of students who will be timetabled within a grid. Usually a cohort will consist of a year level or class, for example all year eight students may be included in a cohort. However, the students who may be included in a cohort is only limited by the constraints of the school. Cohorts may be associated with more than one timetabling period, for example the same Year 9 cohort may be associated with Semester 1 and Semester 2.

Students will be selected for a cohort using the Student Find or by cloning a cohort from a previous timetabling period and renaming it.

Students may be added to the cohort as required. They may also be removed from the cohort if necessary. However, if the student has subject preferences or teaching sets attached, the user will be warned of this when removing the student. If a student is removed from a cohort the class totals will reflect this change and the student will be removed from any associated teaching sets.

Students listed on the admissions roll may be added to cohorts at any time. However, as a student is moved from admissions to the current roll, the user will not be prompted to add the student to a cohort even if he or she is not already in a cohort.

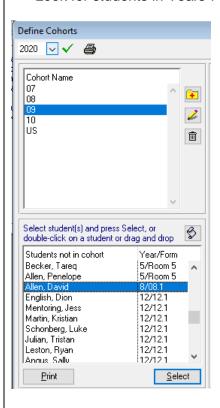


Activity

All students must be attached to a cohort. David Allen has only just enrolled at school and has not yet been allocated a cohort for next year.

Timetabling > Timetable Setup > Cohorts

- Select 2020
- Click on the green tick to make 2020 the default year for Timetable Setup
- Click on Refresh list
- Click on Year/Form to order students
- Look for students in Years 7 to 12 who are not in cohorts.



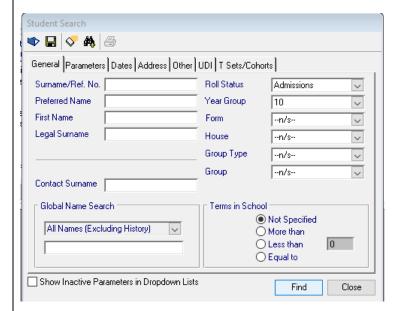
- Select 09 from Cohort Name
- Double click on David Allen

He is added to the Year 9 cohort for 2020.

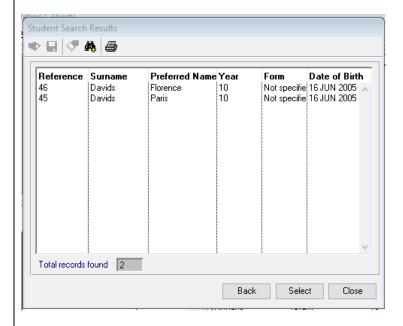
Add Students on the Admissions Roll to a cohort

Florence and Paris Davids are currently on the Admissions Roll. They will be starting school next Year. We would like to add them to their cohort in preparation for next year's timetable.

- Select 2020
- Select Cohort Name 10
- Click Add on the right-hand side of the student list
- Change the Roll Status to Admissions
- Select Year 10 from the Year Group menu



Click Find



Click Select and Yes

Florence and Paris have now been placed in the Year 10 cohort for next year



3.4.2 Promoting Student Courses

Timetabling > Timetable Set-up > Maintain Course Promotion Table

Promotion of a student's course is a tool designed to make entry of subject preferences easier. Students who studied a pre-requisite subject in one timetabling period may want to list the subsequent subject as a preference for the next timetabling period. By using the promote student course function entry the preference is automatically updated for selected students.

If the user wishes to promote a student's course from one timetabling period to another, the promotion path for the subject must be defined showing how students will be moved from a subject in one timetabling period to a subject in a subsequent period. The *Course Promotion Table* performs this function and will need to be set up prior to the course promotion function being invoked. The *Course Promotion Table* will apply to all timetabling years and grids so need only be set up once and then edited as required.

The table will be used to take all students studying a subject in one timetabling year, for example, Year 8 English, to be promoted based on user choice, to a different subject, for example, Year 9 English, in the next timetabling year. Not all subjects within a student's course need be promoted. When applying the course promotion table, the timetabler is able to selectively enable or disable the promotion of each subject or, if appropriate, individual students within each subject.

Editing the Course Promotion Table

The **Course Promotion Table** is accessed from the Timetabling > Timetable Set-up > Maintain Course Promotion Table.

Note: Only those subjects used for promotion need be defined. The Promote Student Course function is only available and initiated from the Bulk Student Preference window.



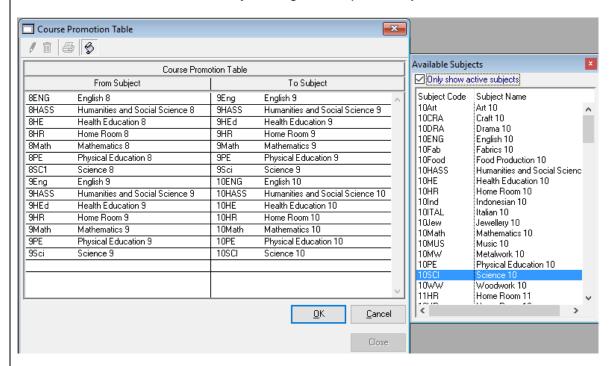
Activity

Enable the promotion of students of Year 9 English Home Room, Maths, Science, and Society and Environment to the same subjects in Year 10.

Timetabling > Timetable Set-up > Maintain Course Promotion Table

- Click *Edit*
 -
- Click Show available subjects
- Drag the Available Subjects window to the right of the Course Promotion Table
- Check Only show active subjects
- Drag and drop *English 9* into the *From* column (A black rectangle will appear once cursor is positioned correctly in the cell)
- Drag and drop English 10 into the To column
- Repeat for the other subjects as shown below

Hint: Click into the row first before you drag and drop the subject



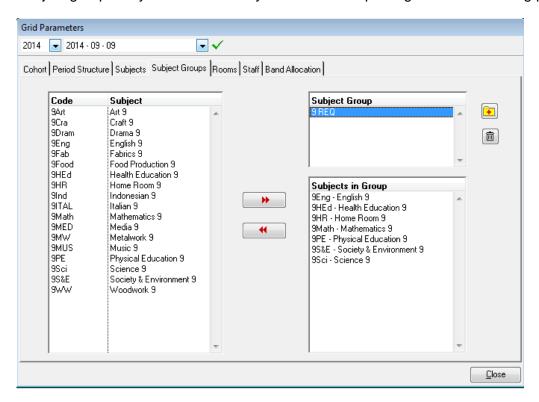
- Click OK and Yes
- Close the window



1.1.4 Grid Subject Groups

Timetabling > Timetable Set-up > Individual Grid Parameters > Subject Groups

A Subject Group defines a set of subjects that may be allocated to students therefore making bulk allocation of preferences easier. This tab allows the user to set up groups of subjects already made available to the grid in the previous screen for bulk allocation to groups of students or individuals. Subject groups may be deleted at any time without impacting on the timetabling process.

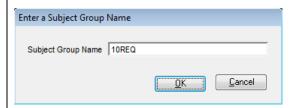




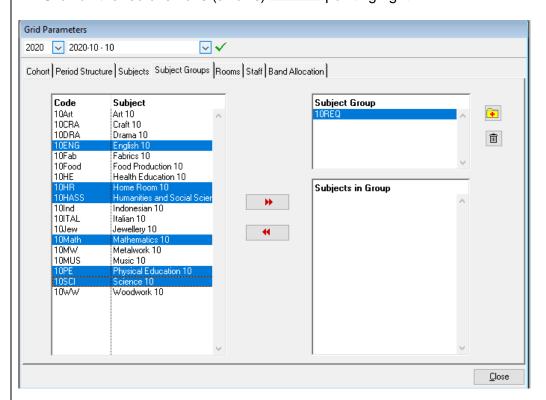
Activity

Timetabling > Timetable Set-up > Individual Grid Parameters

- Select 2020 and the Year 10 grid
- Click on the green tick to make this grid the default
- Select the Subject Groups tab
- Click Add <u>•</u>
- Enter the Subject Group name 10REQ and click OK



- Highlight English, HASS, Home Room, Maths, Phys Ed and Science
- Click on the red chevrons (arrows) pointing right



- Click Close
- Close Timetable Setup

3.4.3 Student Preferences

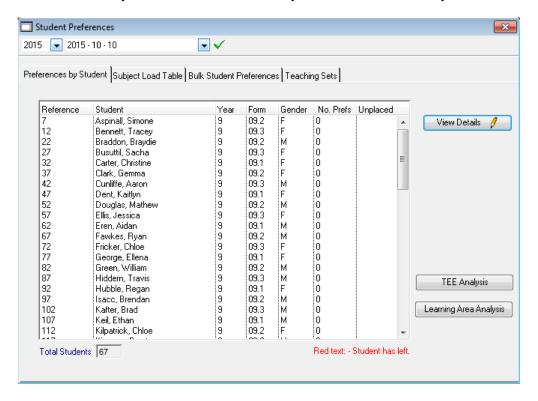
Timetabling > Preferences

Student Preferences are a list of subjects in a ranked order that a student has selected to study.

Preferences may be entered and maintained either for individual students or groups of students. Once the timetable has been created student courses may be altered individually if required. Preferences will be ranked by the following classifications:

- Required all ranked as 1 and must be allocated
- Primary Electives ranked in ascending order
- Reserve Electives those subjects nominated by the student in case any of his or her primary electives are disallowed

Preferences for a student will apply to a grid. If a student is a member of more than one cohort, preferences will have to be entered for each grid. Student preferences may be allocated via a combination of both bulk and individual entry. For example, all required subjects may be entered via the bulk entry screen and electives may be entered individually.



Note: Prior to entry of student preferences, subjects and/or subject groups must be defined for the associated grid. If no subjects have been defined for the grid the user will be unable to enter student preferences.

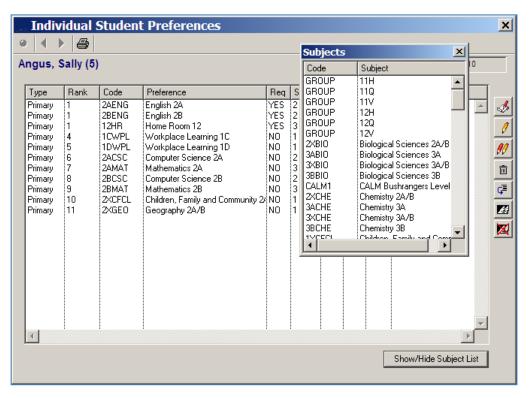


Individual Entry of Preferences

Timetabling > Preferences > Preferences by Student

To select one or more students for individual entry of preferences, highlight the students within the Preferences by Student window and click on the View Details icon.

For each student individual preferences are entered by dragging subjects from the subject list or typing the subject code and ticking the required box as necessary. Preference order may be changed up or down as required. If a browse set has been chosen i.e. a group of students highlighted from the cohort list, use the blue arrows to move between the selected students.





Note: Students must be included in a cohort and subjects allocated to the grid prior to entry of preferences.

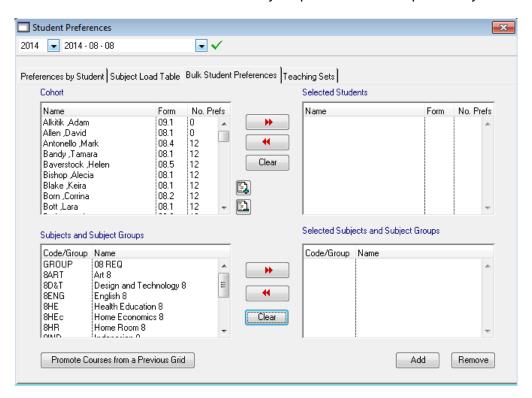


Bulk Entry of Student Preferences

Timetabling > Preferences > Bulk Student Preferences

Preferences may be entered in bulk by defining a list of subjects or subject group and groups of students to which they may be allocated.

Courses may be promoted from last year via the course promotion screen. To be promoted these courses must have been previously defined in **Timetabling > Timetable Set-up > Maintain Course Promotion Table**. Courses may be promoted from a previous year or semester grid.



Adding preferences in bulk to a group of students

- Highlight students in the cohort and click on the arrows
- Highlight the required subjects and click on the arrows
- Click Add

Removing preferences in bulk from a group of students

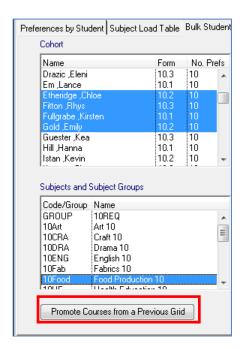
- Highlight students in the cohort and click on the arrows
- Highlight the required subjects to be removed and click on the arrows
- Click Remove

Promoting Student Courses

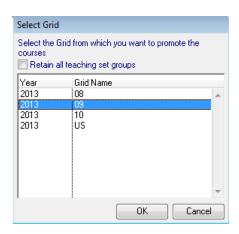
The promotion of student courses from a previous grid is initiated from within the Student Preference > Bulk Entry Window

Click Promote Courses from a Previous Grid

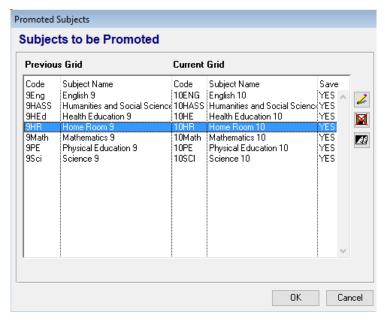




• Highlight the appropriate grid and click **OK**



Note: There is an option to retain all teaching sets.





- Edit as required
- Click **OK**



Allows the user to deselect students from course promotion



Allows the user to deselect subject from course promotion



Allows the user to select which teaching sets are to be retained

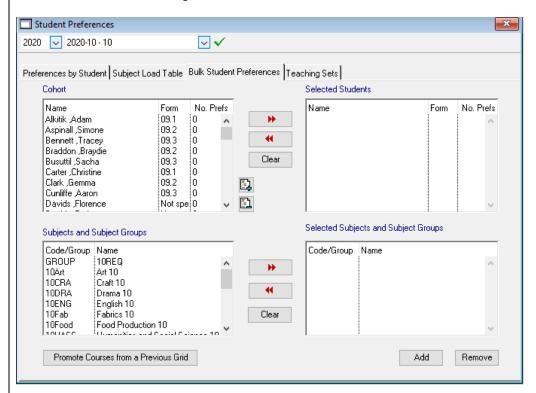


Activity:

Promote all Year 9 students to selected Year 10 courses.

Timetabling > Preferences > Bulk Student Preferences tab

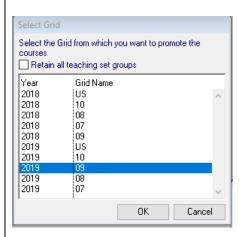
• Select 2020, Year 10 grid and the Bulk Preferences tab



· Click on Promote Courses from a Previous Grid

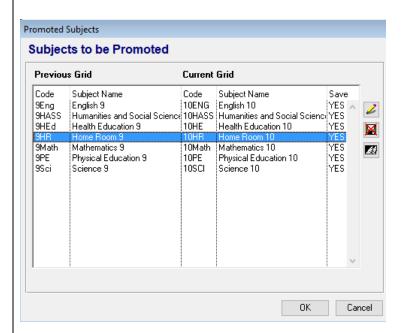
Promote Courses from a Previous Grid

Highlight 2019 09

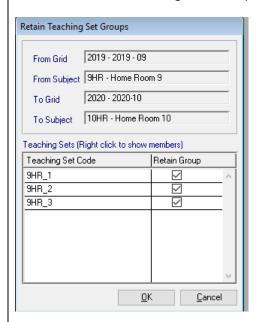


Click OK

Select Home Room



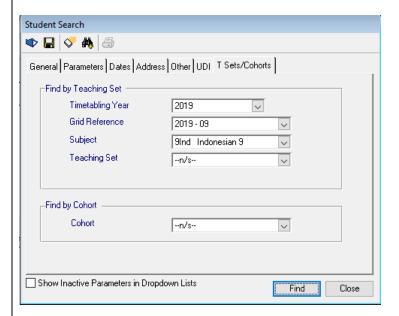
Click Retain Teaching Set Groups



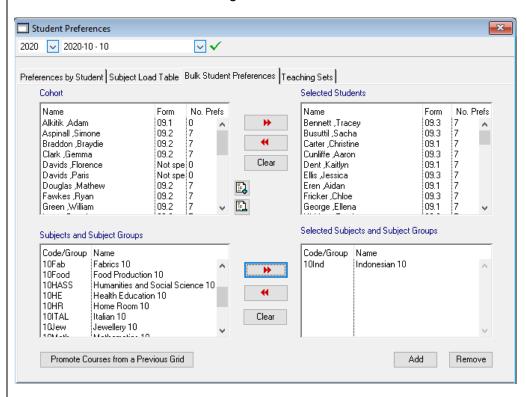
- Check each box and click OK
- To promote all courses, click OK

Allocate Indonesian to selected students

- Click Select those students matching specified criteria
- Find those students studying Indonesian this year



- Click Find, Select and Yes
- · Move the selected students to the right
- Move Indonesian 10 to the right



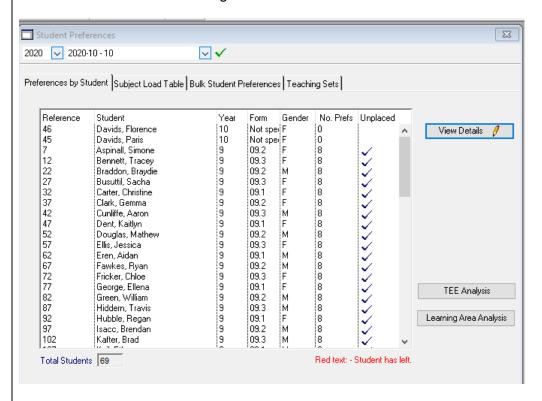
• Click Add

Allocate Italian to all students who studied it this year Student Search 🔷 🔛 🔷 🦀 🗁 General Parameters Dates Address Other UDI T Sets/Cohorts Find by Teaching Set Timetabling Year 2019 ~ Grid Reference 2019 - 09 ~ Subject 9ITAL Italian 9 ~ Teaching Set --n/s--~ Find by Cohort Cohort --n/s--~ Show Inactive Parameters in Dropdown Lists Find Close

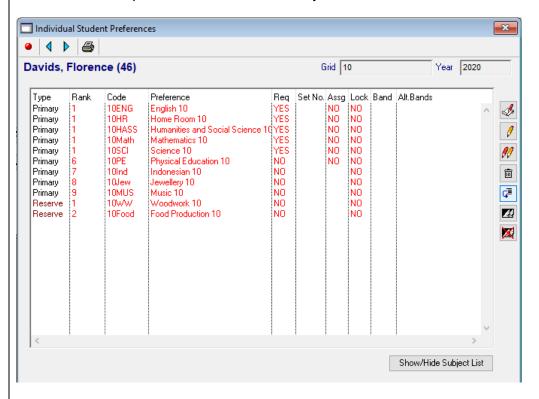


Timetabling > Preferences > Preferences by Student

Click on the column heading No.Prefs

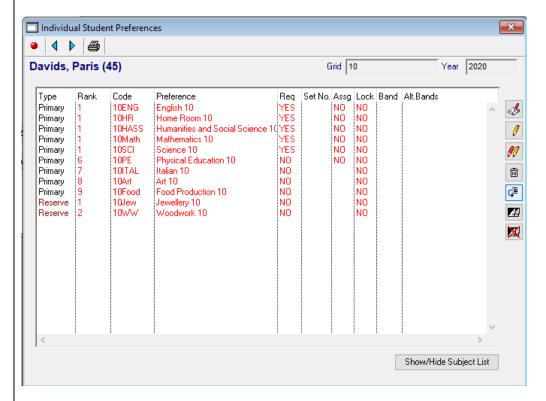


- Highlight the students with no preferences and click View Details
- Click Show/Hide Subject List
- Drag and drop the GROUP 10 Req onto the white screen
- Add the other preferences in the same way





- Highlight Woodwork and Food Production
- Click Toggle to Reserve and Yes
- Click Next Student and enter the following preferences

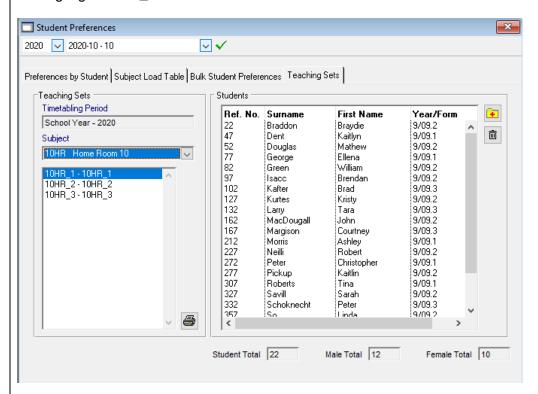


Close Individual Student Preferences

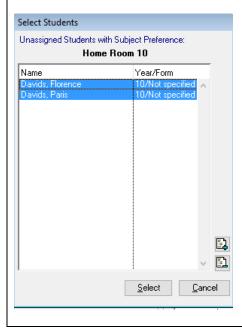
Timetabling > Preferences > Teaching Sets

Assign the Davids twins to a Home Room

- Select Home Room from the Subject menu
- Highlight 10HR_1



- Click Add
- Highlight both names and click Select

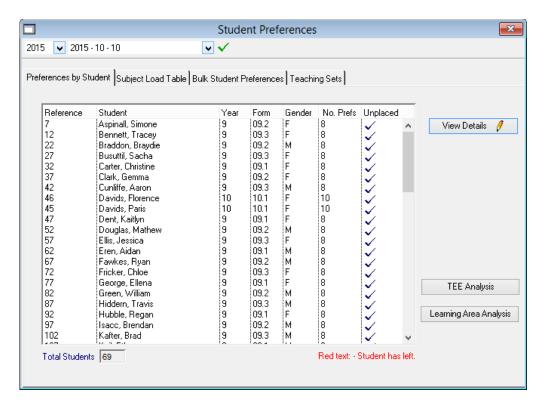




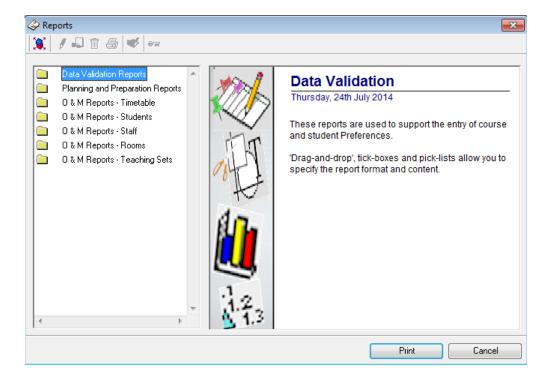
3.4.4 Validating and Verifying Preference Entry

A number of tools are available to validate student preference entry prior to initiating the Grid Modelling process.

The **Preference by Student** window displays the number of preferences entered for each student. This list can be sorted on column headers so that students with too few or too many preferences can be examined.



Other reports are available from *Timetabling > Reports > Data Validation Reports*.



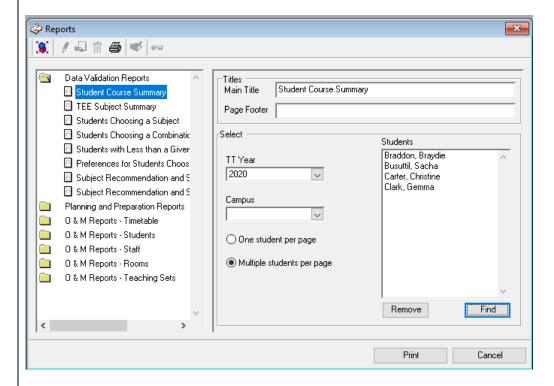


Samples of all of these reports may be viewed in the Timetabling Manual.

Activity:

Timetabling > Reports > Data Validation Reports > Student Course Summary

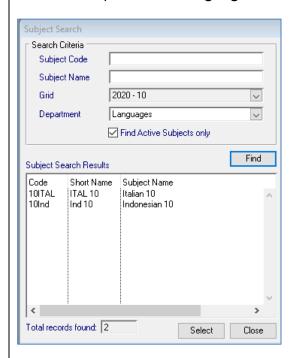
- Select the TT Year 2020 and the Senior School Campus and Multiple students per page
- Use *Find* to locate a few Year 9 students



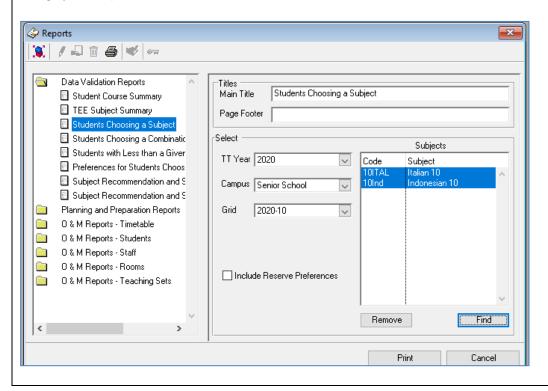
Print the report to the screen

Timetabling > Reports > Data Validation Reports > Students Choosing a Subject

- Select the TT Year 2020, Campus Middle School and Grid 2020-09
- Click Find
- Select Department Languages, check Find Active Subjects only and click Find



- Highlight the Languages and click, Select
- Click Print



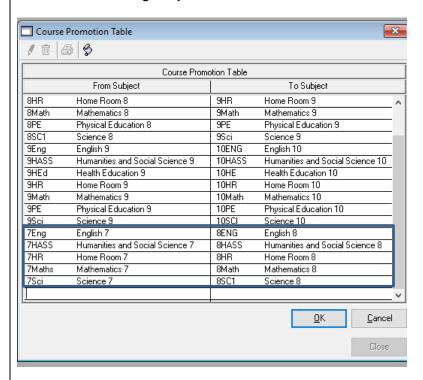


Activity:

Note the pathway you took to complete each of the following tasks

1. Search for the Year 12 student George Pyatt on the Admissions roll and add to the Upper School cohort for 2020.

2. Add the following subjects to the Course Promotion Table.



3. Tracey Bennett wants to do Music and Fabrics with Craft and Art in reserve. Add these to her preferences.

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4 Support

Should you require support please contact the **Customer Service Centre (CSC)** at the Department of Education and Training.

Contact details below:

4.1 Phone (CSC)

Metro: 9264 5555 Country: 1800 012 828

Please be prepared to supply your *ID number*, *contact details* and a *brief description* of the problem.

4.2 Fax (CSC)

9264 4701

Please include your *ID number*, contact details and a brief description of the problem.

4.3 Email (CSC)

customer.service.centre@education.wa.edu.au

Please include your *ID number*, contact details and a brief description of the problem.

5 Online Manuals and Training Notes

5.1 Civica Education

Online manuals and training notes are available to download in PDF format from the Civica Education website.

http://www.civicaeducation.com.au/

Select Integris Support.

Log in to Western Australian SIS Schools.

Username: **school** Password: **help**

5.2 STIMS Project

The Department's Student Information Management Project (STIMS) website has numerous fact sheets and support documents for all SIS Administration modules.

http://det.wa.edu.au/intranet/stims

Links to the RM manuals are also available from the STIMS website or by going to Help within Integris.

