Xronos Scheduler User Guide Release 1.0

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Xronos Scheduler - a scheduling program for schools.

Find the source on GitHub.

Download this guide as a PDF

ONE

INTRODUCTION

or, "What is happening - where, when and with whom?"

1.1 Overview

Xronos Scheduler is a scheduling program designed primarily for use in schools, but potentially of use elsewhere. The idea is to store *all* the scheduling information for the school - timetable, extra-curricular activities, duties, sport, public calendar - in the same place and then make it available in the most useful way for each user.

- Pupils can see their timetables, prep timetables, sport, extra-curricular activities, trips etc. all in the same place.
- Staff can see their own personal schedules, including not just their timetables, but duty slots, trips, sport, meetings etc.
- The general public can see anything flagged as being public with very flexible tools for controlling what is seen.
- Suitable users can see the schedule for a particular room or resource or view the schedules for any member of staff or pupil.

The system can also identify free resources in any chosen category for a particular time.

- A classroom free in period 5 on Thursday.
- A lower sixth former free from 11:30 to 12:15 on Wednesday to take a tour. (Possibly even more specific a lower sixth former who studies geography who is free...)
- A meeting room free on Friday from 12 till 1.

Pooled resources - for instance, mini-buses - can be managed by an administrator. A staff member requests 2 minibuses for Thursday morning. Scheduler collates all such requests, flags possible problems and then lets the administrator decide which particular 2 to allocate. The mini-buses are then linked to the staff member's original event (presumably a trip somewhere).

Think of it as being much like any other calendar program, but with structure added. Instead of having lots of separate calendars it stores just one calendar - and keeps track of who and what is involved in each event. You can then view any part of the calendar depending on what resources it involves.

The objective is to provide all the information which staff and pupils need about what's happening in the school and when *all in one place* and with the information already tailored to suit each individual user. Usually all this information already exists within the school, but it's spread around a dozen different sources. Even information stored within a single MIS can't usually be viewed all in one go - you look in one place for your basic timetable, another for the prep timetable, another for external events, etc.

It is then often necessary to work out how the information applies to the individual. For instance, working from the prep timetable for the whole school, each member of staff and each pupil separately works out which slots apply to him or her. Similarly, for trips, each member of staff has to work out which pupils will be missing from a lesson because all

the year 11 geography students are going on a field trip. This kind of work really should be done by a computer, and Scheduler does exactly that.

Where pupils are scheduled to be missing from a lesson (for a trip, or some other activity) the fact is flagged automatically to the teacher and a list of the affected pupils is provided.

Having assembled the information, it can then be viewed directly in Scheduler, or it can be fed to another calendaring program of your choice. Every member of staff and every pupil can have a feed to his or her pocket device, showing not only the user's timetable but also all the other events in which he or she is involved. For staff, cover lessons can be fed through automatically and made to appear in a different colour.

To the casual user, it at first looks much like any other calendaring program, but the major difference is that instead of holding lots of separate calendars it stores a single structured schedule for the entire organisation. It then provides the means to pick and choose what you see. Casual browsers see only events which are flagged as being public, but logged in users have far more control.



Scheduler is designed to import whatever schedule information is available from your existing MIS - e.g. Timetable, Cover, Extra-Curricular activities - but then it merges that with its own information, to produce a complete schedule for any member of staff, pupil or location within the school.

Users can pick and choose what they see, check for free time, or identify free resources at a given time (e.g. an unused ICT room).

Below is the initial view which would be seen by a fictional teacher (Simon Philpotts) at a fictional school on first logging in. You can log in to the Scheduler demonstration site as Simon Philpotts by using the "Sign in" menu at the top right.

Note the dark blue items (events involving Simon Philpotts directly, mainly his timetable) the light blue items (public calendar events) and one red item which is an instance of cover. Once logged in he can choose to see these or not, plus choose to add any other member of staff or pupil's timetable and much more.



BACKGROUND

Anyone who is involved with a school will know that they are immensely busy places with far more going on than just the timetable would indicate. Scheduler started as a project in a single school to try to keep track of everything which was happening.

Although staff did their best to make each other aware of planned events, this was mainly done by means of public announcements in weekly meetings and lists of pupils pinned to boards. The overhead of every member of staff reading all these lists and mentally comparing them with their own set lists (and taking into account the timing of the events) was considerable.

For some reason, pupils never think to mention that they seem to be scheduled both to play in a concert and to go on a theatre trip on the same evening - not until the actual day arrives anyway.

Early versions worked by parsing PDFs of all the staff and pupil timetables in order to populate the events database! Over time a better import mechanism was constructed and Scheduler now has the means to interface with Schola (an in-house developed MIS), SchoolBase (using direct database access), iSAMS (using a mixture of the iSAMS Batch API, and direct database access where the Batch API is lacking) and WCBS/Pass (using their ODBC interface).

The largest school using it has just over 1000 pupils and 400 staff, and it is the prime repository for much of the school's scheduling information. The timetable, cover and regular activities come automatically from the school's MIS (updated nightly) and then Scheduler holds the school's calendar, plus all the other events which aren't on the timetable.

It handles room bookings (with or without approvals), plus services like catering or cleaning. For any resource, versatile forms can be created through a drag-and-drop interface, allowing rich detail to be collected on, for instance, what catering is required.

Some resources can naturally be organised in pools - for example, minibuses. A trip might need two minibuses, but it doesn't matter to the trip organiser which ones they are. The person responsible for administering minibuses decides which two to allocate. Scheduler provides versatile facilities to facilitate this process.

THREE

QUICK TOUR

Note

You can work through this tour for yourself by accessing the Scheduler demonstration site.

This system runs in a demonstration mode, which means you can skip the usual login procedure. There's a pulldown menu at top right which lets you log in as two different fictional teachers - Simon Philpotts (SJP) or Claire Dunwoody (CED) - or as a fictional pupil.

The demonstration contains just one week's worth of data (always the current week) for a fictional school. It's far from being a complete set of data, but enough to see how it works.

3.1 Public view

When you first access Scheduler you will see a page much like this:

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					Post-season tiddlywinks	training camp	
8am				8:00 - 16:30			
			8:30 - 18:30 Ridgeway	Lower School trip			
9am			Challenge	to Warwick Castle	9:00 - 17:00 9:00 - 10:30 Geography Second-		
10am			· · · · · · · · · · · · · · · · · · ·		trip hand uniform		
11am			-	-			Rowing at Eton Dorney
		Founder's Assembly					-
12pm							
1pm							
2pm				14:00 - 114:00 - 2nd XV 3rd XV		14:00 - 17:00 Inter-house	
3pm				home - away - Asaph's St Asaph's		sports competi15:00 - 16:30 Governors'	
4pm					••••••••••••••••••••••••••••••••••••••	Tea	
5pm						for	
6pm			Year 9 parents'				
7pm		18:30 - 20:30 GCSE options presentation to parents	evening				
8pm		and pupils		19:30 - 21:30 Senior School Production - Les Miserables. Dress	19:30 - 21:30 Senior School Production - Les Miserables.	19:30 - 21:30 Senior School Production - Les Miserables.	19:30 - 21:30 Senior School Production - Les Miserables.
9pm				Rehearsal	Performance 1	Performance 2	Performance 3

It is showing the school's public calendar, which is available for anyone to view. Note the buttons at top left for moving forwards or backwards by a week, and the buttons top right where you can change to a Month, Week or Day view.

You can click on any event to get more information about it (like who is organising it), or you can use the two boxes in the top bar to jump to a specific date, or to do a textual search for a particular event. The text search is reasonably intelligent, so if you search for, for instance "u16 rugby", it will find any event which mentions both "u16" and "rugby" in any order. It is not case sensitive.

3.2 Logged in

If you log in, you can do much more. Click on the "Sign in" button at the top right of the screen, and choose one of the options from the menu which appears:

- SJP logs you in as a maths teacher called Simon Philpotts
- CED logs you in as a French teacher called Claire Dunwoody
- Pupil logs you in as a pupil

Pupils have fewer permissions to do things in the system, but can still use it to view their own individual schedules.

1 Note

In a real system, you would need to authenticate using some actual credentials, but for this demonstration system you can just choose who you want to be.

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	8pm							
	9pm							
	10pm							

If you log in as SJP, you should then see a screen much more like this:

Having logged in, you will find you have full edit privileges to create events within the system, although for obvious reasons you can't edit your own timetable (which comes from the school's MIS), or events created by other people.

Note the left hand column, where you can select the resources for which you want to view events. By default, when you first log in you are shown your events (that is, ones which you have created), events in which you are involved, and the public calendar. Some events (e.g. the rowing event on Saturday) are appearing more than once. This is because they meet the selection criteria more than once.

To tidy up the display, un-tick the check boxes against "My events" and "Calendar" in the left-hand column.

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	9pm						
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The system is now showing just Simon Philpotts's schedule, with one extra item creeping in. At the top of Monday's column there is an entry for "Founder's Day". This is an event in a break-through category which will always show through. Entering such events requires special privileges within the system. They are typically used for things like the start and end of term.

Apart from that, everything else now on the display is an event involving Simon Philpotts. Mostly these are his lessons, but there are a few interesting extra features.

3.3 Cover lesson

In period 7 on Tuesday, there is an entry in red. This is because it is a cover lesson - not part of SJP's normal schedule. To gain more information about this entry, click on it.

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My events	8 Fre2			Sat 17/12	
Calendar	Starts 13/12/2016 15:40	Staff SJP - Simon Philpotts (covering CED)	Group 8 Fre2		
	Ends 13/12/2016 16:30	Subject French	Location L108	30 - 15:00	
	Event category Lesson			ing at Eton ney	
	Event source Seedfile	Simon Sorry you've been hit with this cover.			
	Event id 38	There are some worksheets on the desk Please collect in their books at the e	at the front of the room. end of the lesson.		
	Owner System	Thanks - Claire			
	Created: 12/12/2016 11:39			Add note	
	Updated: 12/12/2016 11:39			Done	
	9pm				
	10pm				

Similar details can be viewed for any event, but there are some extra bits here. It says that SJP is covering for CED, and if you don't know who CED is then you can hover your mouse over the initials to get that information.

Staff SJP - Simon Philpotts (covering <u>CEU</u>	Group 2) 8 Fre2
Subject	CED - Claire Dunwoody
French	L108

Claire has also attached a note to the lesson giving details of the required cover. This particular note is visible only to staff, but the creator of a note can choose to make it visible to pupils and/or the general public as well.

To get rid of the pop-up, press Escape, click on the Done button, or just click anywhere else in the window.

Note that the display for SJP contains more than just his timetable - it can show all the events in which he is involved. On Tuesday evening there is the Year 9 parents' evening (which will appear automatically on the schedules of all those who teach year 9) and on Saturday there is a rowing event in which SJP is involved.

3.4 Other things happening

Two more things are worth noting here.

As Monday is Founder's day, there is a special Founder's Assembly at 11:15. This means that normal lessons will not happen then, and so SJP's normal lesson at that time with 10 Mat3 has been greyed out. The system can do this automatically for the whole school, or just for selected year groups.

On Thursday, one of SJP's lessons has a red dot on it. Again, this has been added automatically by the system and it indicates that some of the pupils seem to have a clashing commitment. Click on that lesson for more information.



A note has been added by the system listing the pupils who seem to be doing something else at the time. 5 pupils are going to be missing out of a set of 25, so that may well affect SJP's lesson planning.

If you look back at the earlier screenshot including the school's public calendar you can see the Geography Field Trip listed there. It might however be interesting to know more about what is going on. Here you can start to see the real power of Scheduler.

3.5 Viewing other schedules

James Greenwood is listed as being involved in this outing, so close the pop-up and start typing his name in the "Add watch item" box at the top of the left-hand column.

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James Briggs (11/DL)	/DCI) Y		Founder's Day					
Philpotts	oam							·
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	5pm			17:30 - 21:00				
	6pm			Year 9 parents' evening				
	7pm							
	8pm							
	9pm							
	10pm							

Either keep typing his name, or select his name from the list which pops up, and James's schedule too will be added to the display. To avoid it getting too cluttered, un-tick the checkbox against SJP's name.

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You can now see James's full schedule, including the Geography Field Trip. Note that his period 3 lesson on Monday has also been suspended for the Founder's Assembly, and all his lessons on Thursday have notes against them. You can see these notes only because you're viewing as a member of staff - pupils can log on and see their own schedules, but they don't see these notes, nor any others unless they have been specifically flagged as being for pupils.

An important point to note is that none of the events shown for James Greenwood explicitly lists him as being involved. Instead they involve groups, and then James is a member of the relevant groups. The system creates each pupil's schedule on the fly by looking at the groups of which he or she is a member, and then finding the relevant events. If a pupil changes set in the middle of a week then the schedule will reflect this, showing lessons in one set at the start of the week, and lessons in the other at the end.

Look closely at James Greenwood's maths lessons on Monday, Tuesday, Thursday and Friday. On Monday and Tuesday he is in 11 Mat3 with David Jones in L102. On Thursday and Friday he is in 11 Mat4 with Simon Philpotts in L101. (Click on the individual event entries to get this level of detail.) The system knows that James changed maths sets mid week, and the display of his schedule reflects this.

Scheduler understands that the population of groups - particularly teaching sets - changes over time. It doesn't store just a list of members but full details of the group's population at any given moment in its history. Schedules will always be displayed taking into account the correct membership for each group on the specific day when an event is happening.

As well as pupils, you can view the schedule of any other member of staff (try Claire Dunwoody - the French teacher for whom SJP is doing a cover) or any room or other resource.

3.6 Summary

Scheduler merges information from your MIS and other sources to give a single unified view of all that is going on. On the timetable front it shows not what *would* be happing in a typical week, but what *is* happening this week.

Try clicking on any of the watched resources in the left-hand column to tweak your display, or on your user name in the top bar to adjust your options. At any time you can get straight back to the schedule display by clicking on "Scheduler" at the top left of the screen.

There is much more that you can do, but this is probably enough for a quick tour.

FOUR

CONCEPTS

Scheduler is built around two basic concepts - events and resources.

4.1 Events

An event is an instance of something happening. It has a time when it happens, and possibly a duration. However, events are for the most part not very interesting unless they involve people or things. The main thing that Scheduler does is to keep track of which resources are involved in each event, and then let events be selected, based on the resources which they involve.

4.2 Resources

Scheduler understands five different kinds of resources which can be used by events, plus two kinds of pseudo-resource used to categorize events.

- Staff
- Pupils
- Groups
- Locations
- Services
- Properties
- Subjects

Staff, Pupils and Locations are fairly self-explanatory.

Services are things like Catering, Parking, Porters or Cleaning.

Properties are used to categorize events - the largest category is Calendar, for events in the school's public calendar, but you can set up as many other ones as you like. Obvious candidates are "Sport Calendar", "Music Calendar", "Drama Calendar" etc. Any event can belong to as many or as few of these as you like.

Subjects are used to keep track of which subject any given lesson is devoted to. In a typical school, it is possible to derive this information from the name of the lesson, but by storing it explicitly, one can then select lessons based on the subject.

Groups are the odd man out in the list of resources. They don't represent anything on their own, but instead allow you to group together any of the other resources. They can do obvious jobs like representing teaching groups or tutor groups, but they impose no restrictions on what resources can be put into each group. Rather than just being groups of pupils, you can potentially create a group containing 6 pupils, 3 members of staff, 2 rooms, plus the Music Calendar. You can also nest groups within groups, and even subtract one group from another.

4.3 Structured information

Much of what Scheduler does could be done with a general purpose calendaring program like Google Calendar, except that they don't usually understand structured information. You'd need to create thousands of separate calendars to cover all the resources within the school, then spend thousands of man hours copying all the events between the calendars.

Instead Scheduler uses just a single place to store all its event information, along with details of what resources are used by each event - staff, pupils, rooms and services. A single medium-sized school can easily have several million such records, and so much has been done to allow selective viewing of just what the user wants to know.

TWEAKING THINGS

There are a couple of areas where you can tweak Scheduler to suit your own particular working style. Firstly, you can click on your name at the top on the right to change some of your user settings.



Here you can change the day of the week on which your week display will start. By default it starts on Sunday, but some people prefer the week to start on Monday. You can even set it start on Thursday if you like.

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Scheduler - Lorem Ip:	sum Academ	y Jump to	o date		Search		Menu 👻 Simon	Philpotts Sign out
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The other two fields allow you to set a default event category, and default event description to be used when you create new events. If you're creating a lot of similar events then this can save time.

There is a subtle distinction in Scheduler between your user record and your staff record. Not all users are necessarily members of staff. There are also things you can tweak on your staff record, and to do this, click on your name on the left hand side of the screen.

That will produce a screen like this:

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Here I can change the colour in which my events appear and whether or not they are currently visible (the same as the tick box next to my name on the main display).

If I tick the "Auto add" box, then any new events which I create will automatically have me added to them. You can do this for *any* resource which you're looking at - not just yourself. Thus if you need to make a lot of events for one particular football team, you can set that team to auto-add to each new event.

Finally, you can tick "Approve events" if you want to be notified by e-mail each time someone adds you to an event. This is a bit like invitations in Google Calendar. You can then accept or decline each invitation as they come in. Alas, some events circumvent this process - it won't give you the power to decline parts of your timetable, or requests to do cover.

For more information about the Reports section of this page, see Creating reports

CALENDAR FEEDS

All the information held within Scheduler can be viewed directly within the program, but it can also be convenient for users to see the information relevant them in their external calendars, or on their mobile devices.

Scheduler provides highly configurable calendar feeds, which are compatible with pretty much any calendaring program. It can provide a feed of events relevant to any resource which it knows about - whether a real resource like a member of staff, pupil or room, or a virtual resource like the school's public calendar, or its sports fixtures.

6.1 Set up

Calendar feeds are specified by means of a Uniform Resource Locator or URL. Scheduler will construct the necessary URLs for you automatically. You then pass the URL to your calendaring program of choice (usually by copying it to your clipboard and pasting it into that program) and it will then fetch the desired events directly from Scheduler.

Logged in to the Scheduler demo system, click on Simon Philpotts's name on the left hand side to see a screen like this:

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Appea ^{Colour} sıp - s	imon Philpotts		Options ✔ Visit □ App	le 🔲 List t ove events	teachers	Auto ad	d Save change	S						

Notice that there are three tabs on this screen - Appearance, Feeds and Report. Click on the Feeds tab, to get a screen like this:



There are various pre-constructed URLs here. The first two are the simplest to use. Of these, the first will give a feed of breakthrough events, not specific to Simon Philpotts himself, but relevant to the whole school. Typically they will be term dates, week letters etc.

The second URL is for the whole of Simon Philpotts's schedule in one go - his timetable, plus all the other events in which he is explicitly involved. Click on the icon to the right of it to copy it to your clipboard, and then paste it into your calendar program of choice. After a short delay, all the events relevant to SJP will appear in your calendar program.

How often they are refreshed depends on your calendaring program, but typically Google Calendar seems to refresh them about every 24 hours.

You can take a feed like this for any resource in the system, not just your own teacher/pupil record. Thus you might for instance take a feed of all the lessons in your normal teaching room, so you can tell when it's in use by other people.

6.2 More detail

If you'd like to get things broken down further, go for the URLs in the next section of the page. The first one (for breakthrough events) is the same as before, but the other two will separate out cover and invigilation events and provide them in separate feeds. You can thus choose to display them in different colours in your external calendaring program.

The end result in Google Calendar can look like this:

🛐 Google Calendar - V	×\													Jahr	0]
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September 2017 < >	GMT+01		Fo	under's Day													
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Terms - Privacy	9pm																

If you then synchronize your portable device with your Google Calendar, you have your timetable always to hand - and up to date!

6.3 Additional options

You may have noticed that the constructed URLs above use various options to achieve the desired results.

1 Note

Options are added to URLs by putting a question mark (?) before the first option, and then if there's more than one option, separating them with ampersand (&) characters.

https://schedulerdemo.xronos.uk/ical/0?able&baker

has two options specified - able and baker.

You can add further options to the URLs given above to tweak the end result.

start_date=YYYY-MM-DD

Specify the start date for the events to be returned in the feed. Without this option the feed will go back to the start of the previous era configured within the system. Typically this means the start of the previous academic year.

end_date=YYYY-MM-DD

Likewise, specify an end date for the events to be returned. Without it, the feed will use no end date - any future events within the system will be returned.

All dates should be given in ISO format - e.g. 2017-09-01

• past_days=N

As an alternative to specifying a particular date, you can say how many days into the past you want the selection of events to go. A value of 0 indicates no past days, so selection will start on today's date.

If both a start_date and a number of past_days are specified, the start_date takes precedence.

• future_days=N

Likewise, you can specify how many days into the future you want event selection to cover. A value of 0 means stop with today's date. If you set both past_days and future_days to 0 then you will get event for today's date only.

If both an end_date and a number of future_days are specified, the end_date takes precedence.

• cover

If specified, only events assigned specifically as cover will be returned in the feed. This is to allow the end user to make them appear in a different colour in the client calendar system.

• !cover

And this one specifies that everything else except cover is wanted.

categories=able,baker

Passes a comma-separated list of event categories to limit the events which will be returned. Only events within those categories will be returned.

The exact list of categories will depend on how your system administrator has set up your system, but you can see them by going into the event creation dialogue and looking at the pop-down list there.

• everything

Merges the breakthrough events into the specified resource's schedule.

• spread=NN

For some feeds, it may be desired to list only some of the locations used by an event. For instance, a play may involve the school theatre, plus a number of ancillary rooms, but for the public calendar only the theatre itself should be mentioned.

Rooms within Scheduler can be given a weighting and if this option is specified then for each event only the room with the maximum weighting, plus any others within the specified spread will be included in the feed.

It is thus possible to filter out the ancillary rooms and show the play as happening just in the theatre.

clip

Some calendar programs fail to handle end dates/datetimes correctly. The ical specification defines these as being *exclusive* - that is, the end date/datetime given is not part of the event. Thus for an all-day event running from the 1st to the 3rd, the end date is the 4th. Likewise, for an event running from 10:00 - 11:00, the end time is 11:00, but 11:00 is not part of the event. If another event runs from 11:00 - 12:00, they do not overlap.

This option tells the ical generator to chop one minute off the end time of timed events with non-zero duration which end at exactly midnight. Thus an event on 2020-02-01 from 17:00 to midnight should have an end time of 2020-02-02 00:00:00, but instead the generator will adjust it to 2020-02-01 23:59:59.

This is contrary to the specification and is provided solely to help with broken client programs. Ideally, fix your client program and stop using this option.

• lm

Or "Last Modified". If specified, then the ical generator will add a LAST-MODIFIED field to the record generated for each event. This will be calculated by looking at the event itself, plus all contributing commitments. The latest time at which any of these was changed will be provided as the LAST-MODIFIED value.

• zulu

If specified, the start and end times of timed events will be given in Zulu time (UTC) rather than the default of using explicit local time. It is then up to the client program to massage these as required for local display.

• dummyloc

Yet another flag to help broken clients which can't apparently be fixed. If specified then Scheduler will provide a LOCATION: field in every entry returned, regardless of whether there is anything to put in it. You really don't want to know the details of what the broken client does otherwise.

You can also use dummyloc=something and then Scheduler will return "LOCATION:something" for every event which lacks an explicit public location.

🛕 Warning

Scheduler caches the result of any calendar feed request for 1 hour. Any additional request for exactly the same feed within that hour will get the same data as the last time, even if something has changed.

If you use the past_days and future_days options above, this can mean that you don't see quite the data which you're expecting if you make a request between 00:00 and 01:00 (and you also requested the same data just before midnight).

SEVEN

ENTERING EVENTS

You enter events into Scheduler in much the same way as you would for any calendaring program, but with one big difference - they are structured. Each event carries information about the resources - people, places and services - involved in it.

🛕 Warning

The most common source of confusion for a new user is entering an event without any resources and then wondering why no-one else can see it. Such an event is visible only to the person who put it in - and then only if "My events" is ticked.

Scheduler is interested in the *resources* which each event uses. An event with no resources might as well not be there.

7.1 Creating

To create a new event in the system, simply click on the relevant date and time, or click and drag to set both a start and an end time. All-day events can be entered by clicking in the all-day section at the top of each day. A dialogue box will appear as shown below.

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Philpotts Description			Event category	
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5pm	17:30 - 21:00			
6pm	Year 9 parents' evening			
7pm				
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10pm				
11pm	Xronos Sche	duler		Version 1.2.1

The first box is simply for you to put in some sort of description of your event. E.g. "Planning meeting for trip to Greece".

🛕 Warning

Again, a common mistake is to try to put unnecessary information in this box. Don't put "Planning meeting for trip to Greece - room 6H", or "Progress meeting - Lord Copper, Jane Eyre and Harriet Vane".

Instead put "Planning meeting for trip to Greece", and "Progress meeting" and then add the venues and/or attendees as resources in the next step. To get the full benefit of Scheduler you need to give it accurate structured information.

The next box lets you put your event into one of a number of broad categories. What exactly is available in your system will depend on how your system administrator has configured it, but these are what are on the demonstration system.
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		Xronos Sched	uler		Version 1.2.1

Because I just clicked on the calendar to create this event, the start and end times are the same. You can change them either here in the dialogue, or by dragging the event on screen later.

The Organiser field provides documentary information about who is responsible for the event. Sometimes the actual data entry is done by a different person, and it can be useful to know who the right contact is. Finally, the Reference field allows extra text to be entered if needed.

7.2 Adding resources

Once you click on the Create button, the dialogue changes slightly - a new field appears at the bottom. The event now exists, and resources can be assigned to it.

Simon Philpotts has been added to the event automatically. This is a user-selectable setting which to start with is switched on - every time you create a new event you are auto-added as one of its resources. To switch if off, click on your name in the coloured block in the left hand column, and then un-tick the "Auto add" box.

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There is only a single field for adding resources. You can type there the name of any resource - staff member, pupil, room, location, service, property or group - and the system will assist you by auto-completing it. As you add resources, they are sorted into their various types and listed as being involved with the event.

1 Note

Try to include all the resources which your event will require. List the staff who will be there. If you want a group of pupils, you can either use a pre-existing group or create one of your own and add that. If you're using a particular room, add that in. If you need a particular service like cleaning or catering, list those too. The whole idea is to share as much information as possible.

🛕 Warning

Don't add people to the event just because you think they might be interested in it. The resources which you add to an event are those which are actively involved in the event. If you want to publicize your event, think about adding it to one of your school's public calendars.

Obviously there are some kinds of resources which need a degree of control. You can't have just anybody putting events into the school's public calendar. Note what has happened here when Simon Philpotts attempted to add "Calendar" as a property to his event.

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Add watch it				,			Sat 3	0/6	
My events	Editing ever	nt							
SJP - Simon Philpotts	Description			E	vent category				•
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It has appeared, but it has an orange question mark in front of it. This indicates that approval is needed before the event will actually appear in the school calendar. The relevant people will have been notified, and once the event has been approved it will then appear. For now, only some users will be able to see it in the context of the Calendar.

1 Note

Who exactly can see un-approved events like this is under the control of the system administrator. Typically it might be staff, but not pupils or the general public. For those who can see the event, it will appear greyed out to indicate that it is still tentative.

See also Specifying Requirements below.

To finish off editing the event, click on the Update button and you will be taken to a dialogue showing full details of the event.



And then if you click the "Done" button the dialogue closes and you're back to the main calendar display.

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5pr	m		17:30 - 21:00				
брі	m		Year 9 parents' evening				
7pr	m						
8pr	m						
9pr	m						
10pr	m						
11pr	m		Xronos Schedul	er			Version 1.2.1

Notice that it's there, but greyed out to indicate that it's incomplete.

7.3 Editing

You can edit any event which you have created, plus your system administrator may give you permission to edit others. To edit an existing event, simply click on it and you'll get shown additional information about the event. Provided you have the appropriate permissions there will also be an "Edit" link on the left hand side.

7.4 Adjusting

Remember that this event originally had no explicit end time? Now the bottom edge of the box can be dragged up and down to set a duration.

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You can also drag the whole box to a different time, or a different day. To make it an all-day event, drag it up into the "all-day" section at the top of the day's column.

Note

If you want to move an event from one day to another whilst retaining the same timing it can be helpful to do it from the "Month" view of the schedule. That way you can see more days, and now matter how you drag, the times of the event won't change.

If you want to set up an event for a specific resource, you can short-cut the process by dragging the required resource from the left-hand column into the calendar at the required time. The same dialogue box will display, but then the indicated resource will be added to the event as soon as it is created.

7.5 Specifying requirements

The request *above* to place an event in the school's Calendar is a simple yes/no request. The person responsible for deciding the contents of the public school calendar will decide whether or not this is a suitable event to go in it. Other requests though may need some ancillary information, and Scheduler provides facilities to gather this information too.

Perhaps, for instance, an event requires the services of the catering department. Adding "Catering" as a resource to the event produces an amber entry as before:

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Filter: off	< > today	24th -	- 30th Jun	, 2018	month	week day day list list
Add watch it						Sat 30/6
My events	Editing ever	nt				
SJP - Simon Philpotts	Description			Eve	nt category	^
Calendar	House party			Но	ospitality	-
	Starts	Ends		Flags		0 - 15:00
	29/06/2018 18:00	29/06/2018 19:00		All day		ring at Eton ney
	Organiser	Reference	an (antianal)	1	Update Can	cel
	SJP - Simon Philpotts		on (optional)			
	Type the name of a reso	urce to add			Add resource	
	Staff SJP - Simon Philpotts ×	Pupils		Locations		
	Groups	Subjects	Services ? Catering ×	Propert	ties	
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	- A A PITT	Xrc	onos Scheduler			Version 1.2.1

But in this instance, the catering department have configured Scheduler to gather more information from the requester. When the user finishes editing the event (clicks on "Update), the following screen is displayed.



There is a form which the user needs to fill in to specify the exact catering requirements. You can either go to the form immediately from here using the "Do form" button, or you can do it later on from the menu in the main screen.

Note also that a "(1)" has appeared next to the main menu button in the top bar - this is to tell Simon Philpotts that there is one item (the form) awaiting his attention. Whenever you see this in the menu you can find the item by following the numbers down through the pop-down menu.

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	5pm						
	6pm		17:30 - 21:00 Year 9 parents' evening			18:00 - 19:00 House party	
	7pm						
	8pm						
	9pm						
	10pm						
https://schedulerdemo.xr	11pm onos.uk/users/1/even	ts	Xronos Schedu	ler			Version 1.2.1

Here we can see that the item is under Menu => Events => Mine, and clicking on that menu item brings up the following screen.



There are two events listed - the two which we've just entered. However, the number displayed was only 1 - this is because only one of these events is awaiting input from Simon Philpotts.

Note the little arrow in the "Action" column. This will appear against any event which requires action from the user. The forms column says there is a form to fill in, and clicking on the "To fill in" link will bring up the relevant form.

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Scheduler	- Lorem Ipsum Academy		Menu	ı (1)		Simo	n Phi	potts	Sig	n out
	Request form for Catering									
	Event: House party Starts: 29/06/2018 18:00 Duration: 1 hr Owner: Simon Philpotts Organiser: SJP - Simon Philpotts Staff: Simon Philpotts									
	Catering request									
	Please try to give as much information as possible to enable us to fulfil your request quickly.									
	How many people do you want to cater for?*									
	And how many vegetarians?									
	Style of catering required									
	Pupils' packed lunches							-		
	Will you require staff to serve and clear away? ©Yes									
	®No									
	Account code* 🕑									
	Save Cancel									

The exact design of each form is under the control of your system administrator and/or the controller of the resource - in this case the catering department. There are a wide range of possible field types and this example shows just a few.

Note that two fields have asterisks against them, indicating that they are compulsory fields. One is a pop down list to choose from, and one gives a yes/no choice.

Once you have filled in the form and saved it, you are returned to the event listing screen.



The form is now shown as being complete, and your count of outstanding actions has gone down to (0). The form and event have now been passed to the catering department for approval, and the requester will be notified when they have dealt with it.

There are three possible responses which you might get to a request like this:

- Approved
- Rejected
- Noted / held

The first one is self-explanatory. The second one should come back with a reason, (e.g. "Sorry - we're already fullybooked for that night.") whilst the third one is generally an indication that more information is needed. For instance, you might have entered "80 to 120" as the number of people for whom you need catering. The catering department thus knows about your request - a good thing - but they need you to firm up the numbers in advance of the actual event. They thus pass it back to you with a "Noted" status, and it's up to you to fill the rest in when you can.

Once a request has been approved, you can no longer change the contents of the corresponding form.

7.6 More than forms

It's possible that the extra information needed is too sensitive to be stored in a relatively public system like Scheduler, or too complicated or it's just necessary to display a message when a resource is requested, without requesting any input.



As an example, here's what happens when the resource "Medical" is requested for an event in the demonstration system.

A note has been added automatically to the event for the requester to see, but there's no way to edit it. It exists purely to prompt the requester to take some particular action. Typically the request will not be confirmed until the action has been done.

All of these prompts and fields can be customised by the users responsible for each individual resource, so it's quite feasible to tweak the prompts as experience is gained in the use of the system.

You can try all this out for yourself by logging in to the Scheduler demonstration site and creating your own events. Don't worry about making a mess - the whole database is reset each night.

CHAPTER

EIGHT

EVENT CATEGORIES

Each time you create an event in Scheduler you allocate it to an Event Category. The idea of these is to give a broad idea of what is happening at the event, but they also provide a degree of control over how events will be treated within the system.

The exact set of event categories which exist within your system is under the control of your system administrator, but the following are the ones which are created by default.

There are three broad groups of event categories:

- · Busy categories
- Non-busy categories
- · Privileged categories

If a person or room is assigned to an event in a "Busy" category then it becomes possible to identify potential clashes. On the other hand, an event in a "Non-busy" category does not imply that the person or room is busy.

Privileged categories have special meanings, and normal users cannot generally create events in privileged categories.

8.1 Busy categories

Event set-up

For time before or after an event when the venue(s) are being prepared or cleared up.

Hospitality

For events where guests are offered food and/or drink.

INSET / Training

Self-explanatory. Has no special significance other than the name.

Interview / Audition

Self-explanatory. Has no special significance other than the name.

Lesson

Probably the most populous category of event, although not usually entered manually. The lessons within your system will typically be imported automatically from your school's MIS.

Meeting

Self-explanatory. Has no special significance other than the name.

Performance

Self-explanatory. Has no special significance other than the name.

Practice / Rehearsal

Self-explanatory. Has no special significance other than the name.

Religious service

Self-explanatory. Has no special significance other than the name.

Sports fixture

Self-explanatory. Has no special significance other than the name.

Trip

Self-explanatory. Has no special significance other than the name.

8.2 Non-busy categories

Date - other

A date which may be of interest to the attached people, but doesn't render them busy. For instance, "Head of Department away" might be a useful event to enter, with all the members of the department added as resources.

8.3 Privileged event categories

Assembly

Self-explanatory. Has no special significance other than the name.

Date - crucial

A key date in the life of the school. Typically used for things like the start and end of term. Will show through on all schedules.

Duty

Used to record duty slots for individual members of staff.

Hidden

Does not show up on any schedule. Used for events which have an effect on the background processing within Scheduler - e.g. lesson suspensions.

Invigilation

Used to record exam invigilation slots. Events in this category are generated automatically by the exam invigilation tools within Scheduler.

Parents' evening

Self-explanatory. Has no special significance other than the name.

Reporting deadline

Self-explanatory. Has no special significance other than the name.

Tutor period

Self-explanatory. Has no special significance other than the name.

Week letter

For schools which have a two week timetable, events in this category show which week is which. They show through on schedules (unless filtered out) and affect the creation of repeating events.

8.4 Choosing

When entering an event, it's quite important to choose an appropriate event category. The more accurate the information which is entered into Scheduler, the more use it then is to everyone else.

In particular, be aware of the difference between "Busy" and "Non-busy" categories. A "Busy" category means that all the resources specified for the event are tied up in that event.

Non-busy categories are particularly useful when you want to draw the attention of staff to some sort of event, without them actually being involved in the event. For instance, if the head of the English department is away for two days at an exam moderators meeting, it might be useful for the rest of the department to know about it. It's tempting to enter an event in Event Category "Meeting", with all the English teachers attached to it.

This is wrong - what you would be telling Scheduler is that the entire English department are in a two day meeting. All sorts of clashes will be flagged because presumably they would have lessons then too.

Instead, enter an event in the "Date - other" category, with all of the English teachers attached. It's a significant date for them, but no more.

More non-busy categories can be created by your system administrator. An obvious potential one is "Prep" or "Homework". This can be used to enter all-day events for particular pupils showing what prep or homework they should have/be doing on that day. The existence of such an event does not mean that the pupil will be busy (and thus absent from lessons) on that day - it's merely documenting something which happens on the day.

8.5 Filtering

The primary way of filtering events in Scheduler's display is by the resources involved in them. However, you can also filter by Event Category.

In the main Scheduler display, click on the words "Filter: off" at the top of the left hand column and a dialogue box will appear.



Here you can choose which event categories you want to appear on your screen. If you un-tick any of the boxes, then all events in that category will disappear from your display. If you untick them all, then you'll see nothing.

To avoid confusion - not being able to find events which should be there - the display changes slightly when you have any filtering active.

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Filter: on < >	today 13th	n – 19th	May, 2	018	month week	day day list list
Add watch item	Sun 13/5 Mon 14/5	Tue 15/5	Wed 16/5	Thu 17/5	Fri 18/5	Sat 19/5
My events all-day	Founder's Day					
SJP - Simon 🕜 6am						
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9am	9:00 - Assembly 9:25 - 10:15 9 Mat1	9:00 - Assembly	9:00 - Assembly 9:25 - 10:15 10 Mat3	9:00 - 17:0 9:00 - Asse Geography field trip	9:00 - Assembly 9:25 - 10:15 12 Mat3P	
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12pm		12:25 - 13:15 13 FMa2P	12:25 - 13:15 13 Mat1A	12:25 - 13: Maths		
1pm						
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4pm	11 Mat4	8 Fre2		13 Mat1A	11 Mat4	
5pm		17,20 - 21, 17,20 - 24				
6pm		Year 9 pa Year 9 evening parents'				
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9pm		Xronos Schedul	er			Version 1.2.1

To restore the normal display, just invoke the dialogue again.

CHAPTER

NINE

NOTES AND FILES

9.1 Overview

Any event within Scheduler can have notes and files attached to it by suitably privileged users. The author of a note can set its visibility so that it can be seen by staff, pupils or the general public, or any chosen combination of these.

1 Note

By default, staff can add notes to events and pupils can't but the system adminstrator can change these permissions as required. They can be changed on a per-user basis, or by creating and editing User Profiles.

These notes can be used for a wide range of purposes. For example:

- If a lesson is being covered the original teacher can leave a note specifying the cover work, which is then accessible to whoever ends up doing the cover. If necessary, worksheets can be attached as files.
- For a pupil activity, the organiser might leave a note visible to all the pupils describing preparation work needed.
- For a public event, a publicly visible note can be added with extra details of the event, a link to Google Maps for directions, and a downloadable programme.

A sample note can be seen on the Scheduler demonstration site. Just click on the rowing event on the Saturday to see it.

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all-day	Rowing at Eton	Dorney							al	22/6	Ŧ	
6am	Starts 22/06/2019 10:30	Staff SJP - Simon Philpo	tts									
7am 8am 9am 10am 11am 12pm 2pm 3pm	Ends 22/06/2019 15:00 Organiser SJP - Simon Philpotts	Refreshments will The location of Do With any luck we : morning rowing. Please could paren the end of the last	be provided in the rney Lake can be fo should be able to m ats not attempt to to event.	school marquee. ound on Google Map: nanage some early ake rowers away be	s. fore	Attachr • Rowi	nents ing.jpg ne to down	load SJP Done	isc et	ë Eton Dorne	BY	
4pm 5pm												
6pm		17:30 - 21:00 Year 9 parents' evening										
7pm 8pm												
			Xronos Scheduler						Versio	h 1.8.2 pr	e2	

This note includes a link to Google Maps, and a downloadable file. The initials at the bottom right (SJP) indicate that this note was added by Simon Philpotts.

9.2 Markdown

For a simple note, the user can type just text and not worry about the formatting. However, if more is required then all the facilities of Markdown are at your disposal. You can create headings, add formatting, embed links and much more.

9.3 Creating a note

Let's take a look at how SJP might have created that note. Before he added the note, his detailed view of the event (gained by clicking on it) would have looked like this:

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My events	Rowing at Eton I	Dorney			Sat 22/6	
SJP - Simon Philpotts	Starts 22/06/2019 10:30	Staff SJP - Simon Philpotts	Property Calendar			^
Calendar	Ends 22/06/2019 15:00			Add note / file		
	Event category Sports fixture				0 - 15:00 ing at Eton ney	
	Organiser SJP - Simon Philpotts					
	Wrap / Repeat Edit					
	Owner: Claire Dunwoody Created: 17/06/2019 03:01 Updated: 17/06/2019 03:01					
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	10pm	Vrance E	chadular		argion 1.9.2 pr	-
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Note the "Add note / file" link towards the right of the dialogue box. Clicking on that produces this view:

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My events	Rowing at Eton	Dorney			Sat 22/6	T
SJP - Simon Philpotts	Starts 22/06/2019 10:30	Staff SJP - Simon Philpotts	Property Calendar			•
Calendar	Ends 22/06/2019 15:00	You can use Markdown to format the l	body of your note.			
	Event category Sports fixture				0 - 15:00 ing at Eton ney	-
	Organiser SJP - Simon Philpotts					
	Edit					
	Created: 17/06/2019 03:01 Updated: 17/06/2019 03:01 Event source: Seedfile					
		Link file Visible to	🖉 Staff 🔲 Pupils	Save Cancel		
	spm					
	9pm 10pm					
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The basic text can be entered very easily. In the next screen, SJP has got as far as wanting to embed the link to Google Maps.

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Filter: off View	7: Default < > today	16th – 22nd Jun. 2019	month week day day list list
Add watch it			0.4 00 <i>/c</i>
My events	Rowing at Eton [Dorney	Sat 22/6
SJP - Simon Philpotts	Starts 22/06/2019 10:30	Staff Property SJP - Simon Philpotts Calendar	-
Calendar	Ends	You can use Markdown to format the body of your note.	
	22/06/2019 15:00	Refreshments will be provided in the school marquee.	
	Event category Sports fixture	The location of Dorney Lake can be found on	0 - 15:00 ing at Eton hey
	Organiser SJP - Simon Philpotts		
	Wrap / Repeat Edit		
	Event id: 5 Owner: Claire Dunwoody		
	Created: 17/06/2019 03:01 Updated: 17/06/2019 03:01		
	Event source: Seedfile		
		Guests Staff Pupils	Save Cancel
	spm		
	9pm		
	10pm		
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Note that the cursor is positioned where he wants the link to go. He then clicks on the "Link file" button (bottom left) to open the link helper dialogue:

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Filter: off View: Default	today 16th – 22nd Jun, 2019	week day day list list
Roy	Generate file link *	Sat 22/6
My events SIP - Simon Philpotts Calendar Ends 22/0 Event Spor Orga SJP - Wrap Event is Vorgation Spor Created Update Event is	Link text ptional URL File name URL of file to link Existing files - click to select one Rowing jpg for the file in the file of the	3-15:00 ing at Eton vey
	Xronos Scheduler	Version 1.8.2 pre2

Here we have three fields:

- The first field is for the text of the link to be embedded. In our case we want to put just "Google Maps".
- The second field is for the required URL.
- The third one is for a file name. It's not needed in this case, but when using an actual file, it will be used as the text of the link if nothing is entered in the first field.

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Add watch if My events SJP - Simon Philpotts Calendar Ends 22/06, Event Sports Organ SJP - : Wrap Event id: Owner: Cl Created : Updated: Event sou	Generate file link Image: Comparison of the second of	Sat 22/6
	Generate Cancel	_
3	9pm	
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Filling in the fields as above and then clicking "Generate" will produce this in the note being created.

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Filter: off View	/: Default < > today	16th – 22nd Jun, 2019	eek day day list list
My events	Rowing at Eton [Dorney	Sat 22/6
SJP - Simon Philpotts	Starts 22/06/2019 10:30	Staff Property SJP - Simon Philpotts Calendar	^
	Ends 22/06/2019 15:00	You can use Markdown to format the body of your note. Refreshments will be provided in the school marquee.	
	Event category Sports fixture	The location of <u>Dorney</u> Lake can be found on [Google Maps] (<u>https://goo.gl</u> /maps/ <u>zyw6KdVL8t8fY8GUA</u>)	0 - 15:00 ing at Eton ney
	Organiser SJP - Simon Philpotts		
	Event id: 5		
	Created: 17/06/2019 03:01 Updated: 17/06/2019 03:01 Event source: Seedfile		2
		Link file Visible to Save Cancel Guests Staff Pupils	
	spm 9pm		
	10pm		
		Xronos Scheduler	Version 1.8.2 pre2

The helper has simply formatted the data given into a Markdown link.

The note is intended to be read by the general public, so click the "Guests" box under "Visible to", and then click "Save" to save the work to date. The note now looks like this:

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Filter: off View	: Default < > today	16th – 22	2nd Jun, 2019	month wee	k day day list list
My events	Rowing at Eton	Dorney			Sat 22/6
SJP - Simon Philpotts Calendar	Starts 22/06/2019 10:30	Staff SJP - Simon Philpotts	Property Calendar		^
	Ends 22/06/2019 15:00 Event category Sports fixture	Refreshments will be provide	ed in the school marquee. can be found on Google Maps		0 - 15:00 ing at Eton ney
	Organiser SJP - Simon Philpotts	Delete		Edit Add note / file	
	Wrap / Repeat Edit Event id: 5 Owner: Claire Dunwoody Created: 17/06/2019 03:01 Updated: 17/06/2019 03:01 Event source: Sendfile				
				Done	
	8pm				
	9pm				
	10pm				•
		Xronos So	cheduler		Version 1.8.2 pre2

1 Note

You don't need to use the helper - it's easy enough to type a Markdown link manually - but it can make the job just a little easier, particularly if you want to embed a link to a file held on Scheduler itself. Read on.

Next we want to embed a link to a picture file which has already been uploaded to Scheduler. We type the next bit of text, then again invoke the "Link file" dialogue.

The text field has been filled with "early morning rowing", and then the other two have been filled by clicking on the icon in the file list below the fields.

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And then clicking on "Generate" we get back to this.

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Note that this time the embedded link points to a file hosted on Scheduler itself.

Finally we can add the last line of text, and because we want it in italics we surround it with underscore (_) characters.

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And then once "Update" has been clicked the final note looks like this.

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Because that second link points to a file actually hosted on Scheduler, a separate link has been created on the right hand side. Clicking either within the text of the note, or on the link on the right hand side will cause the file to be downloaded.

9.4 Uploading files

Assuming your system administrator has given you permission to upload files to Scheduler, you can upload them from the main menu.

Use Menu => Files to get to your list of currently hosted files.



Note the list of existing files, plus a note of how much of the user's available space is already in use.

To upload a file, click on "Choose file", select the file you want from the resulting dialogue, then click on "Upload".

1 Note

The appearance of the file selection dialogue will depend on what browser and operating system you are using. Typically it will be the normal file selection dialogue for your system.

CHAPTER

TEN

GROUPS

10.1 Basics

One of the most powerful features of Scheduler is its support for grouping things together. Any of the other entities which it handles can be placed in a group and then these groups can be attached to events.

A group can contain:

- Staff
- Pupils
- Locations (rooms)
- Services
- Properties
- Subjects

and last, but by no means least:

• Groups

Groups can also have members excluded from them - e.g. all the sixth form except prefects.

All the groups within Scheduler are implemented using the same underlying code and have all the same functionality. There are a few specialist groups (Teaching Groups, Tutor Groups) which have added features, but the underlying group code is identical. The specialist groups are effectively sub-classed from the fundamental Group implementation.

10.2 Chronology

A major feature of Scheduler's implementation of groups is that it understands that the membership of groups varies over time. Pupils join and leave sets; membership of teams changes; the list of people going on a trip has additions and cancellations.

Scheduler stores the whole history of the membership of a group. It can show you not just who (or what) is in the group today, but who was in the group last Thursday, who was in it on the first day of term, and even who was in it last year (if the group existed last year).

When groups are used to display the schedule of an individual (and for pupils in particular, groups are absolutely essential to the calculation of their schedules) the schedule will be correct according to the individual's group membership on each particular day. If a pupil is added to a football team on a Wednesday, then said team's match on the coming Saturday will appear on the pupil's schedule, but not the match for previous Saturday. Likewise (but the other way around) for the pupil who is removed from the team on the Wednesday.

10.3 Eras

Scheduler has the concept of eras - periods of time which group things together. For schools, these are naturally the academic years - usually from one September to the following August.

At any given moment, there is one current era - the current academic year - configured in the system, plus a previous era and a next era. There is also a perpetual era - one which goes on forever.

Each time a group is created, it gets assigned to an era. Usually it's a choice between the current era and the perpetual era. Which of these is best depends on the characteristics of the group being created.

A group like 9MAT1 - year 9, maths, set 1 - is liable to exist in every academic year, but the 9MAT1 from one year bears no relation to the group of the same name from the previous academic year. When a teacher goes looking for 9MAT1 they tend to want this year's one - not last year's or the year before's. Hence, it makes sense to attach 9MAT1 (and indeed, all the teaching sets) to the current academic year - the current era. Groups attached to the current era naturally come to an end at the end of that era - although they aren't deleted from the system and all their information can still be retrieved.

On the other hand, a group like "Geography teachers" has continuity from year to year. There will be changes from year to year, and even during the course of a year, but the meaning of the group stays the same and much of the membership will flow on from year to year. There will always be Geography teachers¹, but the exact membership of the group will change. This group therefore naturally fits in the perpetual era.

Note

Assuming your school has geography as a subject, that last group will be created and maintained automatically as part of the process of importing data from your MIS. Any teacher who takes at least one geography lesson will be in that group, and it will be attached to the perpetual era. It's mentioned here just as a good example of a group which should go in the perpetual era.

10.4 Groups from your MIS

Scheduler is designed to avoid double entry of data, and will import all the groups which it can from your existing MIS. Typically these will be:

- Teaching groups
- Form or tutor groups
- House groups
- Ad hoc groups

The naming of these last ones varies from MIS to MIS, but they're groups created as needed by individual teachers - for example, the list of pupils going on a trip. These can be particularly useful, because you can create the list in your MIS - probably needed in order to fill out the necessary H&S forms for the trip - and then it will migrate over automatically into Scheduler, where you can attach the group to your event. Scheduler will then flag all the affected lessons, listing exactly who is going to miss which lesson.

10.5 Automatic groups

As part of the import from your MIS, Scheduler will also create a lot of automatic groups. These are:

• All pupils

¹ They're like rats - no matter what you do you can never eradicate them entirely.

- All staff
- All teaching staff
- Pupils by year group
- Pupils by house
- Pupils by house and year group
- Staff by subjects taught
- Staff by subjects taught and year group
- Staff by year groups taught
- Pupils by subjects studied
- Pupils by year and subjects studied

More can be added specific to your school.

10.6 Manual groups

Provided your system administrator has given you the necessary permissions (and by default, all teaching staff have this permission) you can create and maintain your own groups within Scheduler. You can also choose whether to make them visible to other users of the system.

Thus, the person responsible for prefects within the school might create a group called "Prefects", populate it with all the relevant students and then make it generally visible. It would probably want to be attached to the current era, because the list of prefects usually changes entirely at the end of the year.

Similarly, it might make sense to create a group called "Senior Leadership" and populate it with all the relevant staff. Again, this would tend to be a publicly visible group, but it would go in the perpetual era.

10.7 Editing groups

To edit groups, use the menu in the top bar and choose Menu => Groups. You may find you already have groups listed if you have created any in your MIS, but otherwise you'll get an empty screen like this:



Click on the "New Group" button and you'll see a screen like this:


Give it a name, and choose which era you want it to go into. You will generally want to leave the "Current" box ticked, and you can decide whether to tick the "Public" box. If you do, then other people will be able to use your group for their events, or for building other groups. If you don't make it public, then it will still have public effects (make events appear in individuals' schedules) but it won't be available for others to use.

Before you can add members to the group, it needs to exist, so click the "Create" button and your screen will change to this:



You now have two additional fields, in which you can enter the names of things which you want to add to the group. All types of things go in the same fields, and Scheduler will sort them as you add them.

Let's say I want to populate my group with all the year 10 students who don't study French. I can do this by using existing automatic groups. First I add "Year 10 pupils" to my group.

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Note that Scheduler shows what I've added, and what the resulting membership will be.

1 Note

For those panicking about the GDPR, all these names are fictional and generated automatically in the Scheduler demonstration system. They change every night. If you log on and try to do the same, you'll see a different set of names.

Now I want to exclude the pupils who study French, so I type "Year 10 French pupils" in the right hand box (for exclusions):

and I end up with this:

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Note that the excluded group has been added in red (to show it's an exclusion) and the resulting list of pupils has got shorter.

Note

The system will even cope with a double negative. Starting from a group called, for instance, "Prefects", you can create a second group called "Prefects except William Wilberforce", consisting of "Prefects" but with an exclusion for William Wilberforce. You can then go on and create a third group specified as being all of the upper sixth, except "Prefects except William Wilberforce", and you'll end up with a group consisting of everyone in the upper sixth who isn't a prefect, plus William Wilberforce.

And it will do all this over whatever chronology you choose, **And** it will do it in real time as your events are displayed. Pretty good for something written entirely in an interpreted programming language - Ruby.

Finally, the two buttons at the bottom of the edit dialogue allow you to clone a group (create a new identical group with a different name, complete with all the nested structure) or flatten a group (create a new group with the same eventual membership, but losing all the nesting). The latter can be quite useful if you want to freeze the membership of your group. You might create it using as building blocks groups provided by other people, but having got the list you want you might not want it to change when the other groups change.

ELEVEN

REPEATING EVENTS

11.1 Concepts

Once you have entered an event into Scheduler, you can cause it to be repeated through the academic year.

You can specify:

- Start date
- End date
- Days of the week (Monday, Tuesday, etc)
- Which weeks (Week A, Week B, Holidays)
- When in a month (first Monday, third Tuesday, etc.)

Any resources attached to your original event will be attached to all the copies as well. Your original event functions as a kind of prototype to create all the others.

When you repeat an event like this, each instance is an event in its own right, but the whole set are joined together under an umbrella record. You can still edit the events individually, but you can also use any of them to repeat the repetition process, bringing them all back into line.

11.2 Restrictions

Events which have been imported from your MIS or other external sources are excluded from the repetition facility. Typically these are things like lessons and meetings, and if they are due to repeat then that should already have been taken care of before they were imported.

Likewise, if an event lasts for more than one calendar day you can't use it as a prototype for repetition - it doesn't make sense to say "Repeat on Tuesday of Week B" if the event itself is longer than a day.

You can only repeat events to which have you some degree of edit access - specifically those where you have sub-edit permission. You thus can't set up a repetion for arbitrary events set up by other users (unless you are a privileged user with extra edit permissions).

The repetition facility is meant to be used within the context of a school's academic year. If you try to go beyond that, you may well find that week letters for instance (which are used to select which weeks to repeat into) have not been defined yet. The repetition code will prevent you trying to enter events over a period of more than a year.

11.3 Creating

Once you've created your original event (see *Entering events*) you will find you have an extra link called "Repeat" available on the left-hand side of the "Show event" dialogue.



Clicking on this link will replace the dialogue with one allowing you to specify your repetition criteria.

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Here you can specify a start and end date for your repetition, which days of the week the event is to happen, which weeks, and when in the month.

🛕 Warning

The conditions you specify here are applied cumulatively. All of them must be met for your event to be created on any particular day. If you specify an occurence in the month (e.g. First, Second, Third) and also specific week letters then your event might not happen in certain months.

E.g. if you specify the first Thursday of a month, and you specify week A only, then the first Thursday might not be in week A, and so your event won't happen in that month.

These two conditions are really intended to be used separately - either specify which weeks you want, or specify when in the month you want - not both.

In the following image, the event has been specified as happening on Wednesday and Thursday of Week A only until the end of May.

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Clicking the "Create" button will cause the requested events to be created, and after a short delay they will appear in the main calendar screen.

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1 Note

It's quite possible to create repetition criteria which do not include the original event.

For instance, you could create an event on a Tuesday and then specify you wanted it to occur on every Wednesday and Thursday of week B. If you do that, then the original prototype event will be deleted as part of the propagation process.

You will still be able to edit your repeating set by way of any of the other events in the set.

11.4 Amending

Should you decide you want to amend a repeating event later, you have a couple of choices. You can amend just one instance of the repeating event and leave it like that, or you can choose to propagate your change to all the other events in the repeating set.

To change one event, just edit it in the usual way.

To propagate your change, click on the "Repeat" link again, and then on the "Update" button.

11.5 Deleting

To delete a single event from a repeating set, just delete it in the usual way.

To delete the whole set, click on the "Repeat" link, and then on the "Delete" button.

TWELVE

RE-LOCATING A LESSON

1 Note

This functionality relates to moving just one instance of a lesson to a different location. If you want to change all the instances of a lesson then it should probably be done through your MIS in the usual way.

There are various reasons why it might be desirable to move a single instance of a timetabled lesson to a different room. The teacher of the lesson might want to move it to a specialized room (e.g. an ICT suite), or it might be necessary to move all the lessons out of a given room to allow for something else to happen.

Permissions to re-locate lessons are controlled by your system administrator, but in general individual teachers can re-locate their own lessons, whilst certain nominated users can re-locate any lesson.

To re-locate a particular lesson, simply click on the lesson in the calendar view. The usual event details dialogue will be displayed, and if you have permission to re-locate the lesson then a link will be there - "Relocate lesson".

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Click on the link and a new pop-down entry box will appear, which after a very short delay will be populated with a list of available rooms.

1 Note

The rooms available here are configured by your system administrator. You will usually find that they are grouped by building or function (or both).

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Aud watch i	12 Mat3P			Sat 16/9
SJP - Simon Philpotts Calendar	Starts 15/09/2017 09:25 Ends 15/09/2017 10:15	Staff SJP - Simon Philpotts Subject Mathematics	Group 12 Mat3P Location	Î
	Event category Lesson	Re-locating	ок	Cancel
	Event source Seedfile	Stay in L101 Stay in L101 ICT Rooms ICT suite A		0 - 15:00 ing at Eton hey
	Owner System	ICT suite B Lincoln Building L103 L104 L105 L106 L107 L109		Add note
	Updated: 16/09/2017 08:37	L110 L111 Grace Building G21 G22 G23 G24		Done
	7pm 8pm			
		xronos Schedu	lei	

The system automatically shows you only rooms which are free at the required time. Click on the one which you want and then click on OK to re-locate your lesson.

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SJP - Simon Philpotts	Starts 15/09/2017 09:25	Staff SJP - Simon Philpotts	Group 12 Mat3P		
Calendar	Ends 15/09/2017 10:15	Subject Mathematics	Locations ICT suite A (normally L10)	L)	
	Event category Lesson		Property Re-located		
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	Owner System				
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				Done	
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	8pm				
		Xronos Sche	eduler		

To move a lesson back to its original location, use the same dialogue and choose the first entry in the list.

Once a lesson has been re-located in this way, it acquires the "Re-located" property, and so all re-located lessons can be viewed at once using the usual event selection tools.

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My events	all-day		Founder's Day					
SJP - Simon 📃 Philpotts	6am							
Calendar ×	7am							
Re-located ×	8am							
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THIRTEEN

CREATING REPORTS

Scheduler can generate a report for you on any of the resources which it knows about - a person, a pupil, a classroom or property. The report will list all the events scheduled for that item over whatever period of time you choose.

Broadly speaking there are two ways to create reports - you can put your requirements into a form, or you can construct a custom URL. The former way is much easier, but you can do just a tiny bit more using the latter way.

Note that the form constructs the URL for you, so you can always start by using the form, then tweak it (or create a bookmark) to get exactly what you want.

13.1 Using the form

To use the form, start by watching the item for which you want a report. See "Quick tour" for details of how to pick what you're watching. Then click on the coloured box for your chosen item in the left hand column. That will give you a screen like this - I've chosen to work with the school's public calendar.

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duler - Lorem Ipsum /	Academy		Search	Menu 👻 Si	mon Philpotts	Sign
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			Sa	ve changes		
Report						
You can get a	listing of all events invo	lving this resource.				
Start date	End date	Event categor	ies	Exclude		
		Comma-sepa	arated list of categories	Exclude events fro	om	
Duration			Resources			
Compact	🔲 Duration 🔲 Ma	ark end	Locations Staff	Pupils		
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You'll notice that on this same page you can also customize the appearance for this resource, but the bit that we're interested in here is the report. This will generate for you a list of events for the selected resource. If you immediately go on and click "Generate" you'll get something like this:

uler - Lorem ×							L	<u>tan</u>]	
https://scheduler	demo.xronos.uk/item/1/days		☆	•) AB		1	Q.	3
- Lorem Ipsum Aca	ademy	Search		Menu	-	Simon I	⊃hilpotts	Sig	Sign out
Events inv	olving Calendar								
Date	Events								
Tue 13th Dec	17:30 - 21:00 Year 9 parents' evenir	ng.							
Wed 14th Dec	14:00 - 17:00 3rd XV away - St Asa	ph's. 14:00 - 17:00 2nd XV home - St	Asaph':	s.					
Thu 15th Dec	09:00 - 17:00 Geography field trip.								
Fri 16th Dec									
Sat 17th Dec	10:30 - 15:00 Rowing at Eton Dorne	ey.							
Sun 18th Dec									
Mon 19th Dec									
Tue 20th Dec									
Wed 21st Dec									
Fri 23rd Dec									
Sat 24th Dec									
Sun 25th Dec									
Mon 26th Dec									
Tue 27th Dec									
Wed 28th Dec									
Thu 29th Dec									
Fri 30th Dec									

This is the simplest form of the report - it starts at today, and goes as far into the future as there are events. Using the form you can specify your own start and end dates, and restrict the events to a list of categories which you choose. (See Reference for a list of the categories.) You can even specify another event property and exclude events with that property from your listing. This can be handy if you want a listing of all events for a given resource which, for instance, *aren't* in the public calendar.

There are also quite a few flags available to tweak the output. It's noticeable in the listing above that multiple events squeeze onto a single line, and there are days with no events at all. I can use the back button to return to the form, then select "Breaks" to add line breaks between events, and "Suppress empties" to remove empty days from the listing and it then looks like this:

Scheduler - Lorem ×										
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Scheduler -	- Lorem Ipsum Aca	ademy	Search	Mer	nu ▼	Simo	n Philpotts	Sign out		
	Events inv	olving Calendar								
	Date	Events								
	Tue 13th Dec	17:30 - 21:00 Year 9 parents' evening.								
	Wed 14th Dec	14:00 - 17:00 3rd XV away - St Asaph's. 14:00 - 17:00 2nd XV home - St Asaph's.								
	Thu 15th Dec	09:00 - 17:00 Geography field trip.								
	Sat 17th Dec	10:30 - 15:00 Rowing at Eton Dorney.								

For further explanation of what each of the tick boxes does, hover your mouse pointer over it and you will see some explanatory text.

After you've run a report, the system will remember the options which you chose, and will present them as defaults the next time you try to generate a report for the same resource.

As always, to get back to the normal calendar display, click on the "Scheduler" button at the top left of your screen.

13.2 Custom URL

Those of a technical bent will have noticed that when you use the form above to generate a report, it actually constructs a custom URL using all the options which you have chosen from the form.

The URL for the last report shown above is:

https://schedulerdemo.xronos.uk/item/1/days?breaks&suppress_empties

This can be useful if you want to save a direct link to a report for later use.

This section documents all the different options which may appear in such a URL, but you are strongly recommended to use the form to automate the construction.

The base URL for generating a report is:

```
https://schedulerdemo.xronos.uk/item/1/days
```

To find out the relevant number for the item which you want, simply hover over one of the coloured boxes on the left hand side of the screen. As an example, the calendar's unique number is 1, so if I wanted a report on calendar entries I would use:

https://schedulerdemo.xronos.uk/item/1/days

which will generate a report on all the current entries in the calendar, looking like this: The events are sorted into their days and appear in chronological order, from today's date until as far in the future as the events go. Should you want to download the report, add either ".csv" or ".doc" to the end of the URL to get either a CSV file (suitable for a spreadsheet) or a DOC file (suitable for a word processor).

https://schedulerdemo.xronos.uk/item/1/days.csv

You can then tweak the report using the following available switches:

compact

This switch reduces an event which spans multiple days to a single entry on its first day. Thus, for instance, a sports trip lasting from 5th Dec to 10th Dec would by default be listed on all 6 of these days. If this option is specified then it will appear only on the 5th.

duration

For use with the "compact" option above. This causes the end date to be included in the single starting entry. Thus for the same sports trip, the entry on the 5th would now read "Sports trip (to 10th Dec)".

mark_end

Again for use in conjunction with the "compact" option. This switch will cause the end day to get an entry as well. If it is added, the trip would also appear on the 10th Dec as "Sports trip - ends"

locations

If specified, the (short) names of any relevant locations will be included with each event.

staff

If specified, the initials of any staff involved will be listed with the event.

pupils

If specified, the names of any pupils involved in the events will be listed.

periods

If specified, the report will try to identify events which exactly line up with period times, and will then identify the event by period number, rather than by start and finish time. Only really useful for reports on stuff which fits the timetable.

start_date=

List events starting on the given date rather than starting from today.

end_date=

List events up to the indicated end date, rather than going on forever.

twelve_hour

Show event times using the twelve hour clock (am/pm) instead of the default 24 hour clock.

no_end_time

Don't show the end time for events - just the start time.

breaks

Put each event on a line of its own, rather than in a solid block.

suppress_empties

If any date has no events at all, don't produce an entry for that date. Useful if the events being reported on are spread sparsely through the calendar.

tentative

By default, the report will contain only events to which the resource is firmly committed. If someone has for

instance, requested a calendar entry but it hasn't been approved yet, then the event will not be listed for the calendar. By adding the tentative flag, you can list tentative events instead.

firm

And by also adding the firm flag, you can get both tentative and firm commitments.

categories=

Provide a comma-separated list of categories to which to restrict the selection.

1 Note

If you've used the ".csv" or ".doc" extensions, then the switches go after the extension, like this:

https://schedulerdemo.xronos.uk/item/1/days.csv?compact

FOURTEEN

CONTACT

For further information about Scheduler, please contact Xronos Scheduling Ltd on 01491 802400 (+44 1491 802400) or e-mail info@xronos.uk

FIFTEEN

CREDITS

Scheduler is written in Ruby, using the Rails application framework.

The underlying database is MySQL

For calendar display it makes use of FullCalendar, with the general interface being driven by Zurb Foundation.

Some of the icons used are kindly provided by Momenticons under the Creative Commons Attribution licence.

One other icon is kindly provided by Double-J Design under the Creative Commons Attribution 4.0 licence.

User-configurable forms are powered by Kevin Chappell's excellent formBuilder

The target server runs Debian GNU/Linux version 9 (Stretch) although it should be possible to run the software on any Linux variant, MacOS X, or even Windows.

SIXTEEN

AVAILABLE DOCUMENTS

- Scheduler Admin Guide
- Scheduler Advanced User Guide
- Scheduler API Guide
- Scheduler Installation Guide
- Scheduler User Guide

Scheduler is licensed under the GNU General Public Licence, version 2.

Note - Scheduler is *not* a timetabling program. It has no facilities at all to solve the problem of school timetabling. If you want a good timetabling program, try Keith Johnson's Timetabler.

SEVENTEEN

INDICES AND TABLES

search