Notes on transferring a completed timetable from *TimeTabler* to Facility

There are 2 ways to transfer your completed timetable from ***TimeTabler*** to Serco-CMIS-Facility:

1. Use the 'managed service' provided by Serco. (Serco make a substantial charge for this.)
   For full details visit: http://www.timetabler.com/serco-export.html
2. Transfer the data manually, as described in this document.

These notes are compiled from details given by John Winters, an experienced User who has regularly created his school timetable in ***TimeTabler*** and then manually transferred it over into Serco Facility, as described in this document.

Overview of the process

First you need to prepare Facility to receive the timetable.
This involves moving everything up by a year. The design of the Facility system doesn't really allow for this to happen easily – the entire database is copied and amended. That's the ***whole*** database, including such non-timetabling things as parents' addresses.
Unfortunately once a copy has been made (in preparation for the next year) then special steps are required to update it each time, for instance, contact details change. This isn't really a timetabling issue, except for the fact that the timetabler tends to be the first person wanting access to the new year's data-set and so is the one pushing for the data copying to occur. This can cause friction.

There are two main programs involved in the timetable entry process:

Facility Admin is the main Facility program and the one which is used for all day-to-day running of the system, both timetable related and other.
Some attempt seems to have been made to include the functionality for creating a timetable in this program but it doesn't work and Serco advise that it shouldn't be used.

Instead a second program – **Facility Scheduler** – exists for the purpose of creating the timetable.

To use it you have to do a data export from Facility Admin – writing the data to a file – and then open that file with Facility Scheduler.
You can then make whatever amendments you want to the data – anything from a single room change to the creation of a whole timetable. Then re-save the file and then import that file back into Facility Admin.
It is vitally important that the export/import stages are paired up precisely, otherwise corruption of the timetable will occur.

All the early steps occur in Facility Admin. See Steps 1-12 below, in Part 1 of this document.
The actual entry of the timetable occurs in Facility Scheduler (see Part 2, on page 4).

In theory most of the preparatory work (Steps 1 to 12) can/should be done by the school Facility Administrator.

It can be done as early as you like, but there remains the problem of the whole database being copied. Once the new copy exists it will start to diverge from the copy currently in use, unless you ensure that both copies are updated.

The only information you need to do the end-of-year processing is what Years carry through (eg. Y7 ➠ Y8).

PART 1

Starting from scratch the steps are as follows (working in Facility Admin).

Consult the Serco documentation for details on how to do each one – these notes merely include the special comments relevant to the current task.

Step 1 Create the new dataset.

Step 2 End of year processing

Note that you do this even though it isn't yet the end of the year. This copies over everything (!) from the previous year and updates some things from year to year.
Where possible, choose to roll things over from year to year (eg. Year 10 sets roll to Year 11).

Step 3 Check and amend Staff records

Any new staff are entered at this point.
I find it helpful to have a few semi-permanent dummy entries here – XTA, XTB, etc. These stand for eXtra Teacher A and are for use where a member of staff hasn't been recruited yet. The use of X is to make it as unlikely as possible that they will clash with a real teacher's initials.

Step 4 Check and amend Departments

Step 5 Check and amend master Subject list

Step 6 Check and amend school Subject list

Step 7 Check and amend the course Subject list

You can get some very odd effects if a Subject exists in the master subject list and not in the school or course subject list.
Specifically you can schedule lessons for the Subject in Facility Scheduler but then they get silently unscheduled when the data is transferred back to Facility Admin. This can take a while to track down if you don't know the symptoms!

Step 8 Check and amend Subject–Teacher associations

This is a particularly important step because Facility Scheduler won't let you assign a lesson to a Teacher if it thinks that the said Teacher isn't paired with the Subject.
And you can***not*** amend these associations in Facility Scheduler! You have to re-import your data into Facility Admin, change the association and then re-export.

Step 9 Check and amend Sites

Step 10 Check and amend Rooms

Step 11 Check and amend Teaching Groups

Facility has 3 different kinds of class groups:

Administrative class groups,
Virtual class groups,
Teaching groups.

Administrative class groups come over quite well via the end-of-year processing.

Virtual class groups have to be created again from scratch.

Teaching groups work fine where they stay the same from year to year, but I find I need to re-create Year 7 (new pupils), Year 10 (entering GCSE course so new sets) and Year 12 (starting AS courses).

Step 12 Check and amend Time constraints

At this point I deliberately ***avoid*** putting ***any*** constraints on staff – either total number of periods or when they are available. (See also the notes in the appendix on page 5.)
Because I am creating the timetable in ***TimeTabler*** I do all that sort of thing there. If I choose to override one of these constraints I don't want Facility complaining at me again when I transfer the timetable in.

Having done all this you can do a data export to a file ready to start doing the actual creation of the timetable **structure**, in Scheduler.

For each year of your school you need to make use of three different **'Planning matrices'.**
The naming of these seems strange and they don't even appear in order in the menus, but they are as follows:

Planning matrix	Purpose
Course/year curriculum	To create Blocks, limited links etc. These specify what lessons will occur and how they are linked. (Eg. all Maths lessons simultaneously, or all Science lessons cycling round in their own 'pebble-dash' out-of-block or 'pure class' groups.)
Assigning teaching groups	To associate Teaching Groups (ie. actual groups of pupils) with the lessons.
Subject/teacher class (all courses)	To assign Teachers to lessons.

When I am working in the first three of these matrices I create the lessons slightly differently from how I would if I were going to use Scheduler to create the timetable.

For lessons which occur in lock-step for the whole YearGroup (examples in my school are Maths and English, which are setted separately and so the whole year has to have Maths or English at the same time), then I create them in Facility as Blocks.

Likewise for Option columns in the GCSE years, I create the lessons as Blocks.

For lessons which cycle around in a sub-set (eg. all our Science lessons are setted together, but not setted with anything else) I do ***not*** use the 'Limited links' which are Facility's way of handling such things. I just put them in as individual lessons.

For the outer 'pebble-dash' of lessons (ie. lessons taken in class/registration-group/form groups and not separately setted) I also enter them as individual lessons.

The reason for the above choices is that entering setted lessons as Blocks speeds up the drag-and-drop activity later on, but entering 'Limited links' buys you nothing.

So, for each of your Year Groups you need to invoke each of these Planning Matrices in turn.
They are a bit boring to set up but when you've finished you will have a full set of lessons in Facility Scheduler which just need scheduling to specific time-slots, as described below.

Part of the boringness is caused by a bug in Serco's implementation of Drag-And-Drop. You can't just pick up a Block and drag it. You have to click on the thing which you want to drag, wait a moment and then click on it again to drag it. If you don't wait quite long enough then it's seen as a double-click which does something different!

========== **WARNING** ==========

There is a bug in the code handling the Planning Matrices. If you create a lesson (or block of lessons) in the first matrix and then realise you've done it wrong and delete it again, then the lesson is only partially deleted. It disappears from the Planning Matrix but ***not*** from the totals of number of lessons created. You thus find yourself unable to create all the required lessons for that virtual class group.
The fix is to go to the manual scheduling screen (where the lesson will still appear, despite having been deleted) and delete it again there.

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Once you have entered all your lesson lists it makes sense to re-integrate the data back into Facility. Personally I do it after each Year Group, but then I'm paranoid.

PART 2

At this point you reach the parting of the ways. If you were going to go on and use Facility Scheduler for the actual creation of your timetable then you would go on with the rest of Serco's instruction manual.

We however are going to enter in the timetable which we have already created in ***TimeTabler***.

Step 1

To provide me with all the relevant timetable data in an easy-to-read form,

- I go to the **Class Timetable Screen** in ***TimeTabler***, reached from the main scheduling screen, (see section F15 in the TimeTabler Manual), and
- Click on **Print** ➠ **Detail** to get a Printout of the completed timetable.

This gives me the entire school's timetable in a very compact form on one or two pieces of paper.
The only information which it lacks is the full list of teachers for lessons scheduled as a block. It shows just the first teacher in each block. For this reason I keep a copy of my original Curriculum Diagram to hand too.

An alternative would be to use a 'master' Class Timetable Printout (as in Section J15 in the Manual, perhaps using the compact forms shown in examples 3 & 4 in J15). Choose a font-size that suits you.

Step 2

With this information to hand, do a data export from Facility Admin and open the file in Facility Scheduler. From the menus choose: Timetable ➠ Course and then for the filter choose: 'Course from events'. Choose a course of KS3 and a Year of 7 (or whatever you want to start with).

This then gives you a drag-and-drop view of the whole week for Year 7.

Pick up the lessons one by one and drag them to the appropriate time-slot.

There are a few niggles:

a) If a group has, for instance, two doubles and a single each week then you can't predict which one you will pick up when you start to drag. Just drag it to the right slot for one of the doubles and if it turns out that you got a single (which one you get seems to be entirely random – it's not connected to the order in which they're listed) then drag it again to the right time-slot for the single, and then drag one of the doubles to the first slot.

b) Your view of the week leaps around unpredictably and you sometimes have to scroll twice to get it to let you see what you want to see. It helps if you have a really big monitor or dual monitors.

c) Sometimes the program just gets totally confused and won't let you drag and drop any more. If it does that, just exit the screen and re-enter it and things should be working again.

Save your data regularly. I again re-import to Facility Admin after each completed Year Group.

It's very, very dull, but I find I can copy over a whole timetable within a working day.
It may help to have an assistant to call out the moves.

Appendix

This appendix includes notes & comments by other Users.
If you have extra thoughts & suggestions to help others, please email them to keith@timetabler.com

1. Where to enter the constraints?

A User (Ian) wrote "My experience is that even though inputting a timetable manually I want to have all the details such as Class constraints. For example, the number of repetitions allowed – Facility is much more sensitive to things like 6 lessons in 5 days for our Sixth Form)".

John Winters replies: "I'd stick to my original suggestion (above). If you put the constraints into both ***TimeTabler*** and Facility Scheduler then you have to tell ***both*** of them when you decide to bend a constraint.
It's a question of deciding where the 'Check I don't break any constraints' functionality is to sit. If ***TimeTabler*** has already checked my constraints for me then I see no point in Facility Scheduler doing it again, particularly as it's much harder to tell Scheduler: 'Yes, I really want to do this' – as this often involves a save/import/change/export cycle."

2. More about constraints

The same User (Ian) wrote: "It works much more efficiently if all of the above constraints are correct and it is important that each week of the year is correctly mapped (very tedious)."

John Winters replies: "In my experience, if I tell ***TimeTabler*** that a constraint is required then it gets it right. I don't need a second program to double-check it."

3. Yet more about constraints

Ian also wrote "There is an element in Facility Scheduler that does not allow a subsequent correction – it will flag the change as an error ad infinitum and this can prove to be very annoying. For example, you want six periods of English on separate days but Saturday is unavailable – it will continue to flag that you have 2 lessons in a day throughout the process even though you have altered the parameters – extremely irritating although in principle it is of benefit to show errors in this way."

John Winters replies: "This I think lends further weight to my method of doing it, as described in this document. If you don't tell Facility Scheduler about the constraints in the first place then it doesn't have the scope to get confused."

4. Entering by Years/Classes or by Staff

Ian wrote "I actually do this differently (it probably does not matter) but I transfer the info by each member of Staff. Each teacher takes about 5 mins so it is about 8-10 hours for our school which has about 140 teachers in all."

[For a typical school, with 50 staff, it would take less than 5 hours.]

John Winters writes: "I haven't tried it this way. I think it's a case of horses for courses. Use whatever works for you."

5. Using Blocks to save time

Ian wrote: "In many parts of the school there are blocked subjects and entering the first teacher's lesson will enter the entire block of course."

John Winters writes: "This is an important point (and why I suggested including blocked courses in the Facility Scheduler setup). Provided you do that then you get this benefit (ie. drag one lesson from a blocked course into place and all the others at the same time follow) regardless of whether you use Ian's method (teacher by teacher) or mine (year by year)."

If you have any thoughts & suggestions to help others, please email them to keith@timetabler.com