# RM Integris - User guide to importing a timetable and creating a rota

At the start of a new academic year, schools who use the Programme Management module and make use of the Timetable functionality will need to import their timetable and set up the rota of the timetable cycle.

If any changes are made to the staff details, rooms, teaching sets, these will be changed when an updated timetable is imported into RM Integris. When importing any updates, the changes will take effect from the **next day** to the end of the academic year. Schools can import a new timetable **before** the next academic year has started, as you can have the current and upcoming year's timetable in RM Integris at the same time.

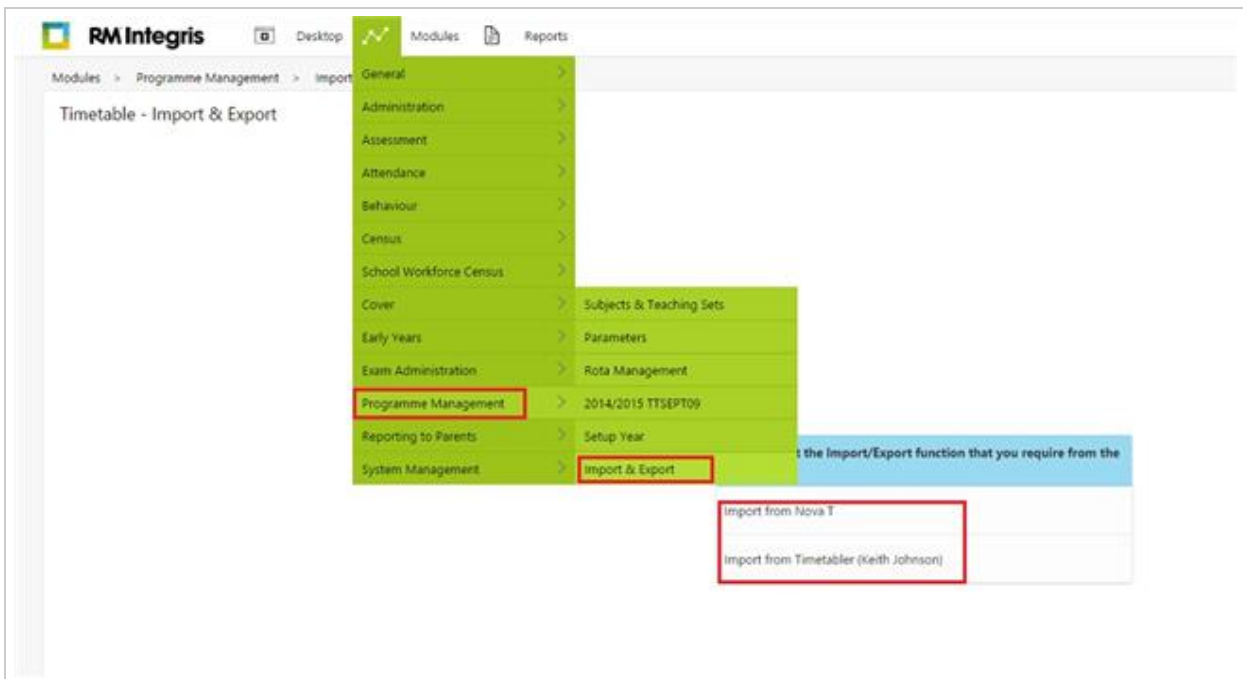To import a timetable you **must have** the following:

- The functionality available in RM Integris.
- The correct roles assigned to the user to ensure they are able to access all of the necessary screens.
- The school year added to the school diary.

We also advise ensuring you have the time to complete the import in one go. If you are interrupted at any point you should click back to ensure that your link to the RM Integris server is still valid, as assuming it is and carrying on may result in data being lost that you think you have completed.

## :: Procedure

### How to import a new timetable

1. Click Modules, Programme Management, Import & Export.
2. Select which timetable software you are importing from:
   - Nova T
   - TimeTabler (Keith Johnson)

> ⊳ Image showing the 'Timetable - Import & Export' window

3. Check the school year is the correct year you wish to import the timetable for.
4. Select the timetable import file (browsing to the saved file on your computer).
5. Ensure the meeting 'to' and 'from' dates are correct.
6. Import Type - there are normally two radio buttons that can be selected:

   o Update Existing Rota - updates the rota named as the current live rota (from and to dates).
   o 'Import as a new Rota' - creates a new rota and replaces the existing timetable and teaching sets for the chosen dates.

If this is the first import you are doing for the new academic year, then you will not see these options and it will assume you are doing a new rota.



> ⊳ Image showing the 'Import Wizard - File Selection' window
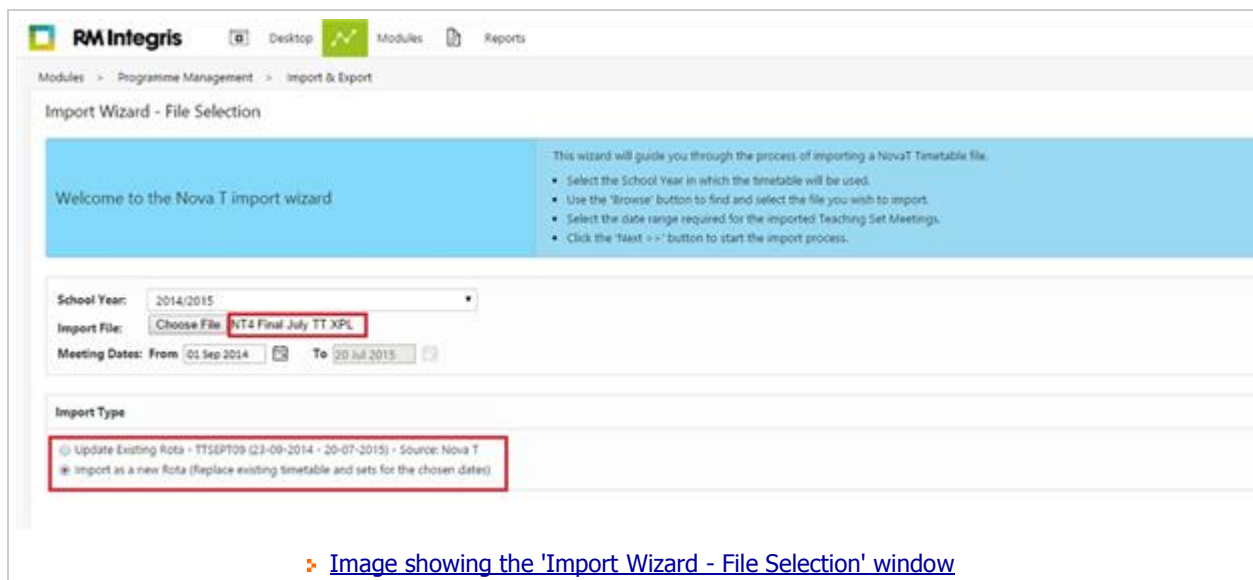
It is **very important** that you select the correct option at this point.

- It is expected that you will select 'Import as a new Rota' at the beginning of the academic year.
- The Update Existing Rota option will be selected when updates to the rota are made in your timetable software, i.e. room changes.

7. Once you are **absolutely sure** you have chosen the correct option, click Next.

**Import Wizard - Resource Matching**
- When selecting to Update Existing Rota or to 'Import a new Rota', you **have to** ensure that the teachers, rooms, subjects and teaching sets **match**.
- If they **do not match**, you will end up with **duplicate** rooms/teachers/subjects/teaching sets. If this does happen:
    o Students may **not** be linked to the correct teaching sets.
    o Staff may **not** be linked to the correct teaching sets.
    o The **new** teaching sets will be the default option chosen.

8. Once you have matched the staff, rooms and subjects correctly, click Next.

> ▸ Image showing the 'Import Wizard - Resource Matching' window

If this process is **not** completed, you will see warning messages on the screen regarding your data.

For example:



> ▸ Image showing an example warning message

Only click Yes if you are **absolutely sure** that your data is **correct**.

> Image showing the warning message
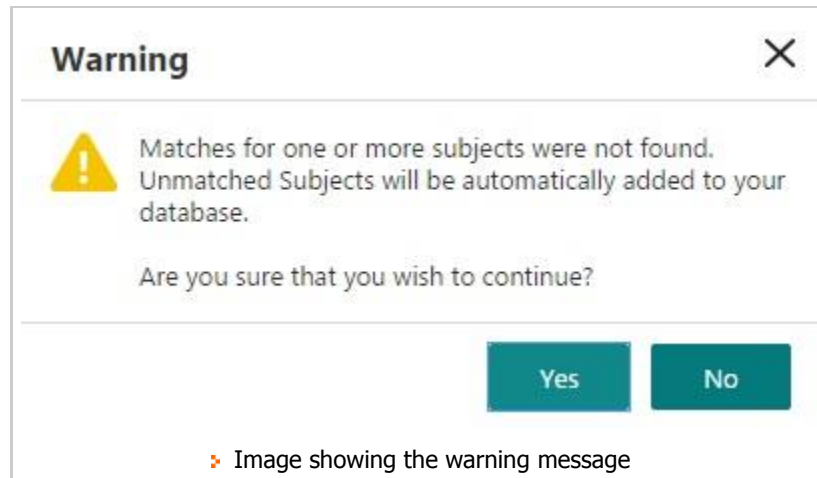
**Import Wizard - Rota and Cycle**
After clicking Next, you will now see the 'Import Wizard - Rota and Cycle' window.



> Image showing the 'Import Wizard - Rota and Cycle' window

- This page is for you to confirm the key details for your chosen rota and cycle.
- The rota code and rota name can be changed in this window.
- You can change any remarks about the data and check the live dates.
- In the Cycle Details section, you can tick the days that your cycle days will apply to, i.e. Mon, Tue, Wed, Thu and Fri (for a standard school week).
- Click Next.

**Import Wizard - Curriculum and Non-Teaching Activities**
- This window can be used to check what is in the import file and whether it matches what is expected.
- Use the tree to view the details of proposed changes.
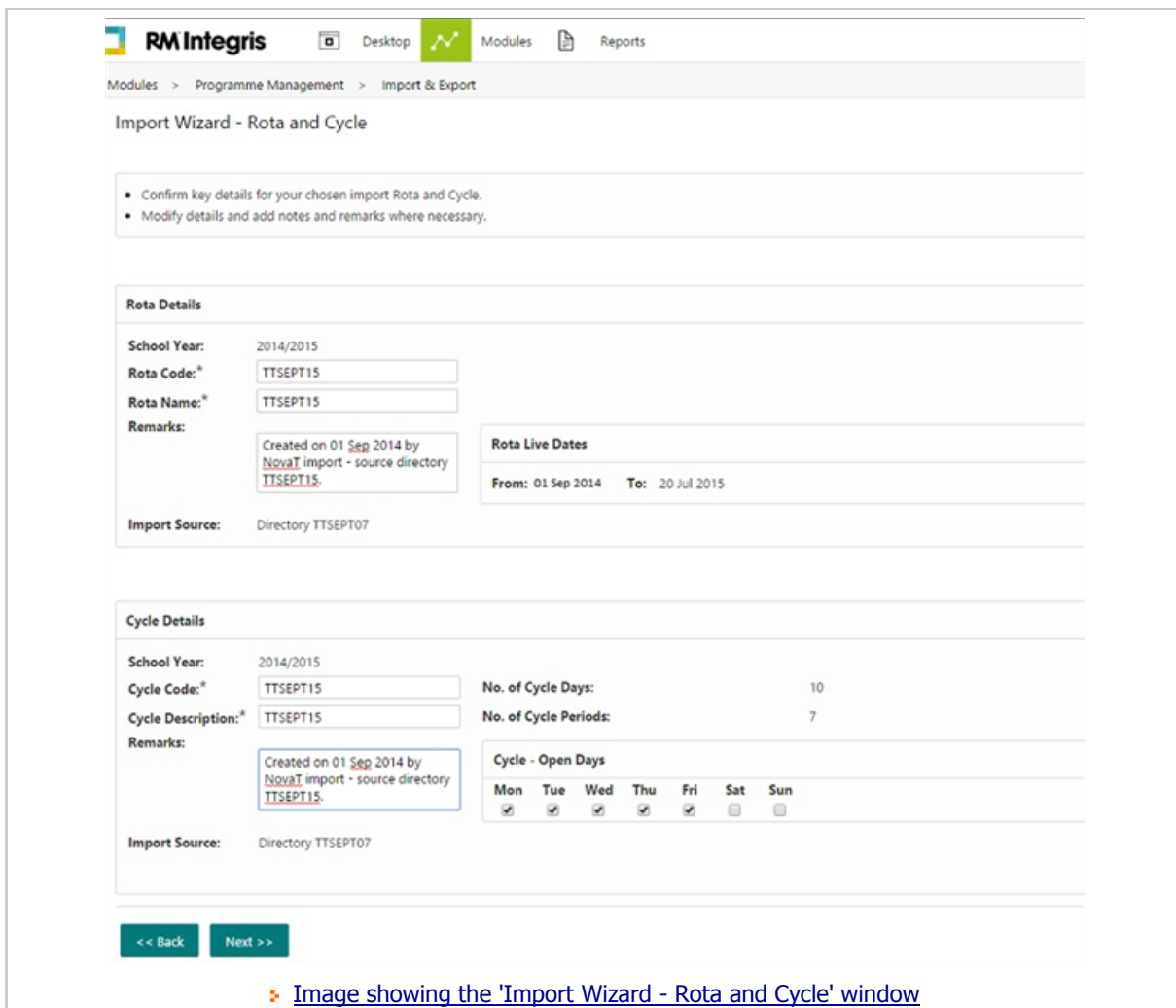- The Non-Teaching Activities tab lists all non-teaching activities i.e. used to reserve rooms for PPA for example.
- Once you are happy with the details in these screens, click Finish.

**Note:** Once you have clicked Finish, any changes **cannot** be rolled back so you need to be sure that you have complete all the links required. If you do not link teaching sets which are the same in the incoming file to the current timetable you will see duplicate teaching sets and the old one will have students and the new ones will be empty.  Students will then have to be moved manually and the old teaching sets cannot be deleted so will have to be renamed.



> [Image showing the 'Import Wizard - Curriculum and Non-Teaching Activities' window](link)
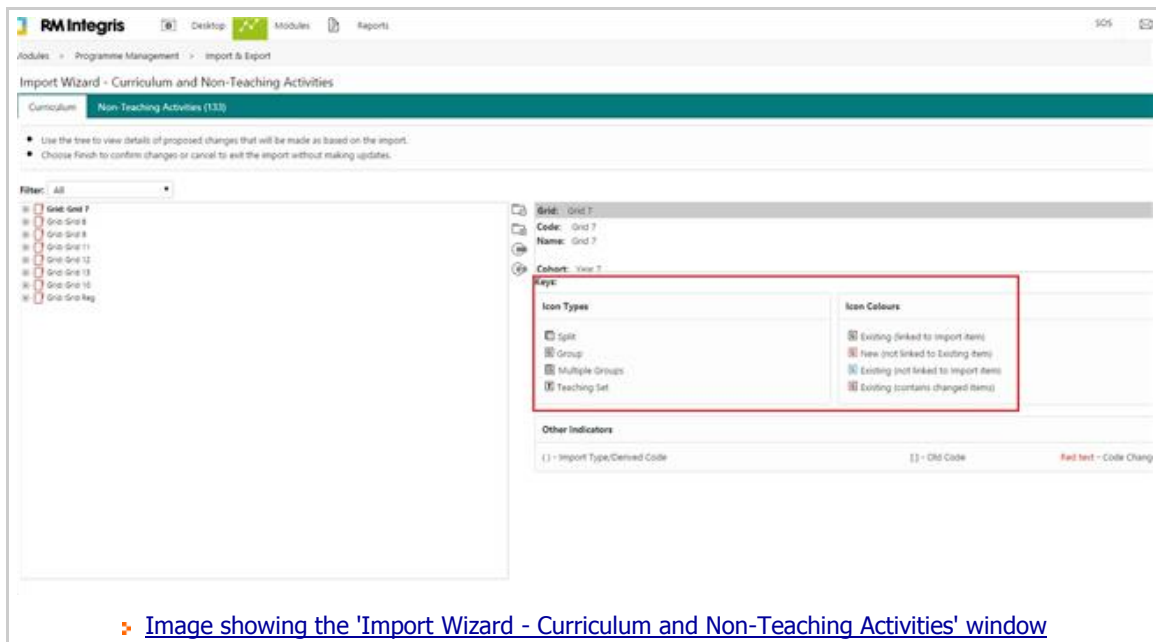
- A report will generate that can be printed off and checked at a later date.
- Click Close.
- A warning message will appear at this point:
  "Please ensure that you check and edit the new cycle that has been created by this import **before** the new rota goes into operation on <*the date entered as the From date*>. To do this, use Programme Management, Setup Year, Timetable Cycles to choose and edit the new cycle. **Note that it will not be possible to correct period structure and related details once the cycle goes into use**".
- Only once you are completely sure the data you are importing is correct should you click OK to this warning message.
- Once you have clicked OK you have imported a new rota or an update to an existing rota.

You will now need to go through the following steps to ensure the timetable is set up correctly.

**Setup Year - Edit Timetable Cycle**
1. Click on Timetable Cycles.
2. Click the Edit icon to edit the cycle.



> **Image showing the Timetable Cycles window**
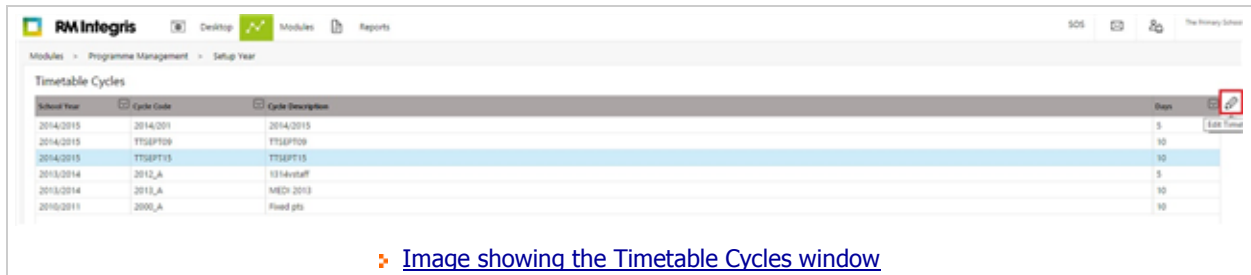
3. In the Definition tab you can select the number of cycle days, i.e. 5 day cycle (for a one week rota) or a 10 day cycle (for a two week rota).
4. Tick the days the rota is set up for; for some schools, lessons will be conducted on a Saturday.
5. Click the Period Structure tab (this is where you set up the rota cycles).



> **Image showing the Period Structure tab**
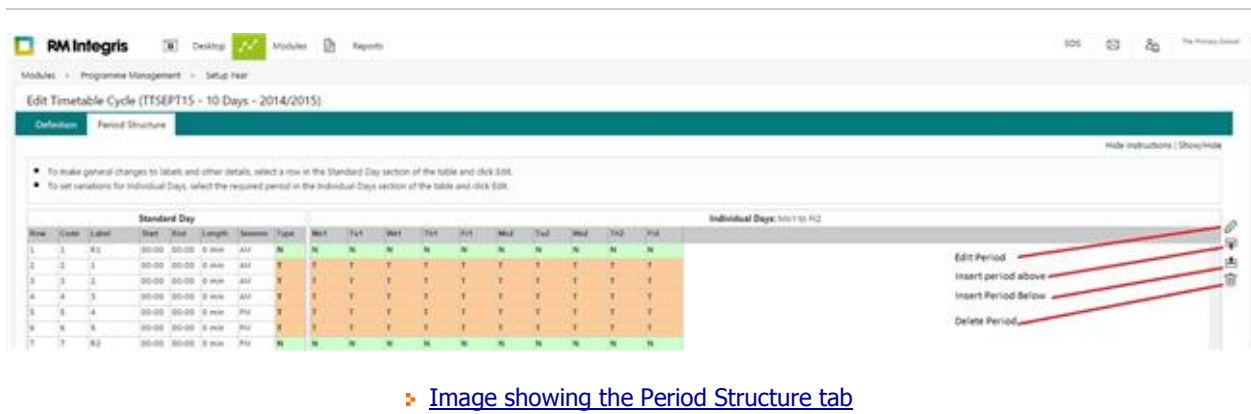
- The periods that are displayed are the periods you have set in your timetable. As such, you **cannot** change the **period type** for **any period** showing in this screen.
- To insert additional periods such as home, break or lunch, you should use the insert before and after options in the right-hand menu.
- **Do not rename** the periods that are already displayed.

For example, if you want to have a home period at the beginning of the school day, you would select the first period in the table and click the Insert Period Before icon in the right-hand menu. A new period will be inserted and can be edited as required.
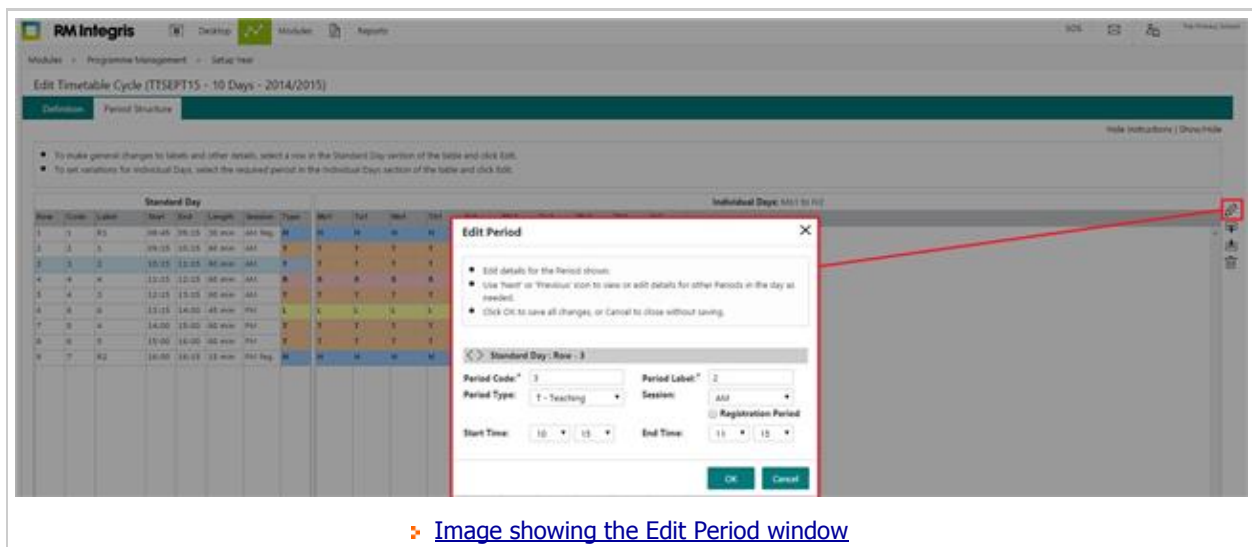
- Insert all of your additional rows at this point.
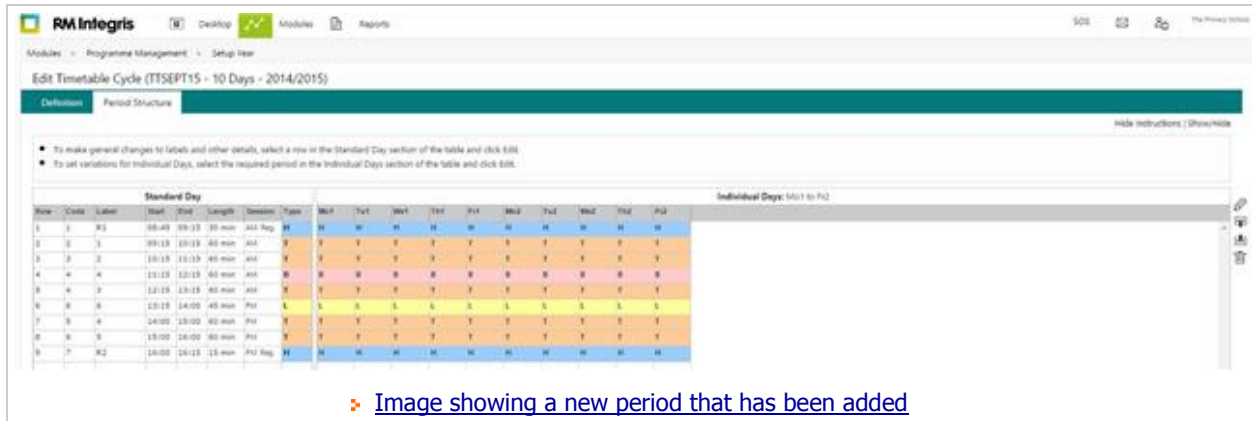
You will now need to edit the period structure to apply the period type and times; to do this:

1. Highlight the first cell and click Edit.
2. Change the code to match the label (if necessary).
3. Change the session activity as needed i.e. teaching to home.

**Important: Do not click OK.**

1. Make all of the changes in one edit by clicking the right arrow to update each period in logical succession.
2. Set all periods before and including lunch as AM.
3. Ensure that you set one AM and one PM period as a registration period by ticking the box under the Session drop-down menu.
4. Once you have edited all periods, assigning the start and end time of each period, click OK.
5. If you are running a ten day cycle and you have different period times for weeks one and two, you will now need to enter the second set of times.
6. To do this, click on the first cell and click Edit.
7. Enter the times as needed.
8. When you click OK you will see that a clock icon appears in the cells where the session times are different.
9. The show/hide functionality will show full details of each period if required.

**Note:** It is important that you review the changes you have made. If any further changes need to be made, they must be done **before** the related rota goes into use, as it is **not** possible to correct these details once a rota is live. When completing the cycle, please pay particular attention to the following areas:

- Period codes, labels, start and end times, period types.
- Ensure that home, break and lunch periods are present/inserted when necessary.
- Check that the period sessions and identified registration periods have been correctly set to ensure correct operation of lesson attendance.

If you are uncertain of any of these settings please:

- Review and update them in the Definition and Period Structure tabs on this screen.
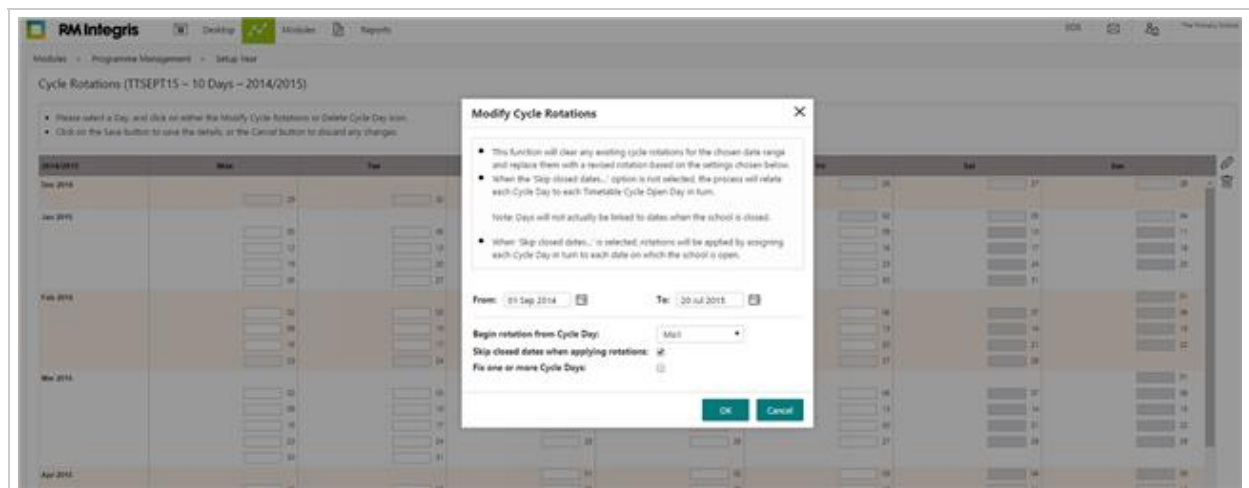- Check the appearance and details using the Model Rota screens and by printing sample timetable reports.

Once you are happy with the period structure, tick the Cycle Setup Complete box and then click Save.

**Setup Year - Manage Cycle Rotation**
1. Click on Timetable Cycles.
2. Click on Manage Cycle Rotation.



> [Image showing the Timetable Cycles window](#)
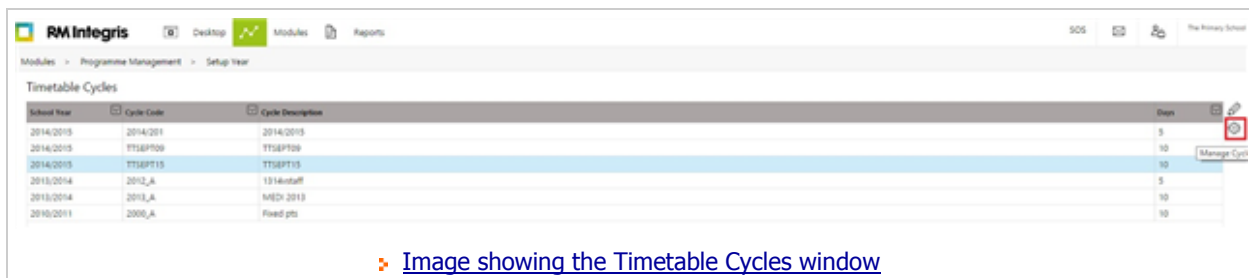
3. Click Modify.
4. Check the From and To dates.
5. Check the cycle start day.
    o For 10 day rotas - Do you want the first Monday in school to be MonA or MonB?
    o For 5 day rotas - What day is the first day back at school? If it is a Thursday for example, you would set the first day of your rota as Thursday.
6. In the Cycle Rotations screen, click the Modify Cycle Rotation icon in the right-hand menu.

7. Select the 'Begin rotation from Cycle Day' e.g. Tuesday.
8. Tick the 'Skip closed dates when applying rotations' box.
9. Click OK. The sessions will now be populated with the cycle rotation data.
10. Click Save.

**Note:** Go to Rota Management, select the rota you have imported, click the Quick Link icon which will add a quick link in the left-hand sub-menu for this timetable.
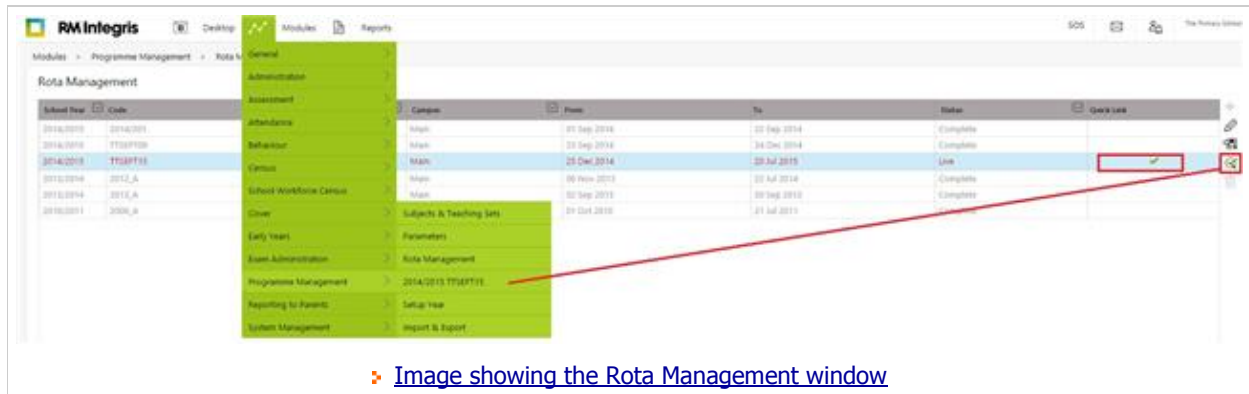
11. Click on the Quick Link rota in the left-hand menu.
12. Select Tools, View Details - this will show your timetable and allow you to view the sessions to check that the rota is correct.

### Subjects and teaching sets

**Note:** You are **not** able to add **any** students to a teaching set if they are **not** in a **cohort group**.

To ensure that students are in the correct cohort group:

1. Select Setup Year, Cohort Management.
2. The screen will show you a list of your student groups (usually by year group).
3. The cohort groups are created during the import/import update process.
4. You can show the details of the cohorts and edit the definition in RM Integris.
5. To refresh the students so that they appear in the student list, highlight the year group in the table then click the refresh icon.
6. The students will then all show in the table.
7. Ensure you set the Membership to 'Any Time of Year'.
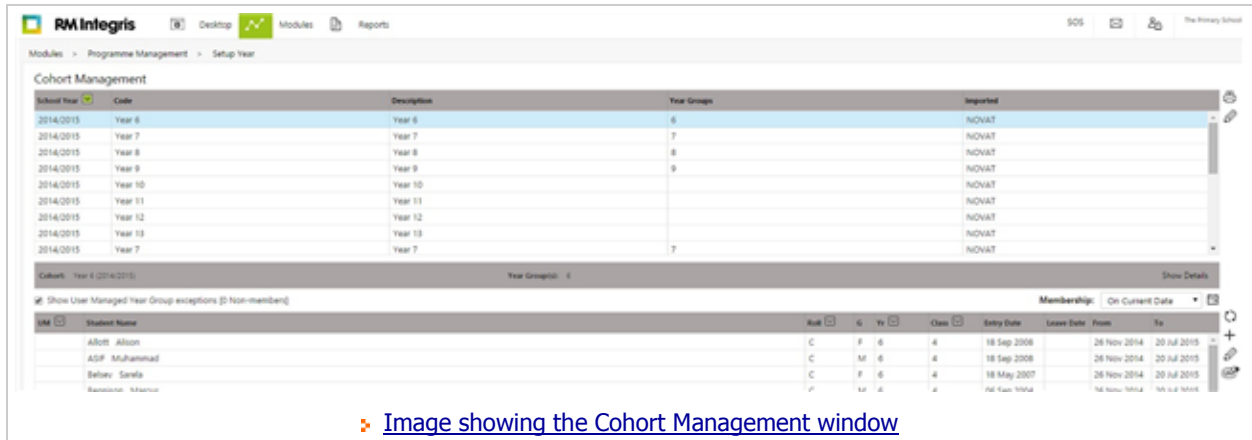
> Image showing the Cohort Management window

8. The show/hide details will show you the options currently set to the highlighted group, for example:
   o The refresh settings indicate that each night the system will check student cohort membership based on year group data.
   o If it finds a student who is no longer in the cohort group, it will add an end date to the membership and remove the student.
   o If a new student has been added, the refresh will include that student in the cohort group as needed.
   o The automatic refresh also takes into the account the dates of the academic year.
9. Edit Details (default settings are used).
   o The details can be changed if required.
10. There are **two types** of exceptions:
    o A student is not in a specific year group, however, the school does require the student to be in the cohort group for a specific year group.
    o A student is in the year group selected, however, the school does not require the student to be in that cohort group.
11. By using the Add icon, you can add specific students to cohort groups.
12. Any student details amended by Delete or Add will have the UM (user managed) icon added to their name.
13. Once the students have been added to their cohorts, you will then be able to assign them to the relevant teaching sets in Subjects & Teaching Sets, Teaching Set Allocations.