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Appendix 1 – Two Week Timetable Date Mappings
Introduction

This document covers, step by step, the setup required in Progresso for any schools using TimeTabler to create their schedule.

It also details the import routine once the timetable has been completed in TimeTabler.

It assumes that you are starting from scratch in creating a new academic year ready to setup your new timetable and starts from the beginning, however, if you are part way through academic progression or setup, please do still read through all of the steps and ensure all data is correctly in place to help ensure a smooth import.

If you have any queries or come up against any problems related to Progresso setup whilst working through this preparation or during the import, then please contact our Support Team on 0330 060 2199. Alternatively, use the support site for live chat with a support representative, to search the knowledge base or log a call.

Once the preparation in Progresso is complete and you are ready to begin timetabling in TimeTabler, further documentation produced by the TimeTabler team detailing full functionality and how to export the finished schedule is available with the software and additional information is available from http://timetabler.com/ and from the help pages in TimeTabler itself.

Any questions relating to that side of the setup or regarding TimeTabler in general is best directed to TimeTabler Support in the first instance - support@timetabler.com however, both teams will try and help wherever they can with any issues.

When considering Teaching Groups, you can either:

1. Use the Academic Progression process to promote existing teaching groups with learner populations, create any new/additional teaching groups required in Progresso and match the codes exactly in TimeTabler – this way, they will be automatically linked to the timetable as part of the import process. If this is done, you can populate the new groups and change the setting between existing groups at any point during the entire process.

2. Don't progress any teaching groups and import them (with or without learners) instead so they match new/TimeTabler codes and they will then be matched automatically on the import process. The import can be done and learners populated at any point during this process.

Choice 1 is most recommended to save time and for convenience but teaching group codes must match exactly and dates must be within the timetable source for them to match and you may have hundreds of groups to match so please do pay particular attention to this section.

The following page contains a high-level process flow.
<table>
<thead>
<tr>
<th>Step</th>
<th>Task</th>
</tr>
</thead>
</table>
| 1    | Create the new Academic Year in Progresso  
- This can be done any point from September of the new year onwards  
- Must be completed and is the first step in this overall process |
| 2 - 4 | Setup Staff and Rooms  
- Any rooms and staff being used on the 2017/2018 timetable must be setup and mapped to the correct courses  
- Staff and Room codes and names must be matched EXACTLY between Progresso and TimeTabler – an export from Progresso can be taken to import into TimeTabler to ensure this is the case  
- Must be done before you start creating the timetable in TimeTabler |
| 5 & 6 | Academic Progression Mapping - Learners and Registration Groups  
- This must be done before the start date of the 2017/2018 academic year to ensure learners are promoted correctly  
- It should be done before importing the timetable |
|      | Creation of New Teaching Groups  
- This is optional BUT HIGHLY RECOMMENDED: if you wish to ‘promote’ teaching groups (e.g. 7a/Ma1 to 8a/Ma2 with associated learners) and keep learner populations then you can link them automatically or manually to the timetable during the import process  
- Must be done before the import and codes and years must match exactly if you wish link automatically during the import |
| 7    | Check System Setting is for TimeTabler |
| 8    | Export core details for TimeTabler, create the schedule in TimeTabler and export for Progresso |
| 9    | Import TimeTabler file to Progresso – create the source, set the date mappings, match teaching groups, associate teachers to groups, check learner timetables – check and print! |
In order to progress learners, registration groups and (should you wish to do so), teaching groups for the new Academic Year, you will need to complete the setup in Progresso. It is important that you setup the dates for the Academic Year and complete each required step of the academic progression correctly – it is recommended that a Data Manager do this in conjunction with the Timetabler as the two processes are closely tied.

The Academic Year setup in Progresso is powerful and elaborate because it involves the definition of terms, mid-term breaks, training days, etc.

When adding dates for the new Academic Year, non-volatile data such as rooms, staff and Subjects - i.e. data that doesn’t change significantly between years – will continue to be active into the new date range – learner and group progressions are dealt with in the Academic Progression.

Note: The creation of the Academic Year and the first two steps of the Academic Progression are the very least required to be able to import a TimeTabler file so should be done at the start of the overall process.

If you are part of a Cluster of schools, it is possible to copy and use an Academic Year structure which has been created at Cluster level. If you are part of a Cluster and they have made an Academic Year available to you, you will see two options – one to Add an Academic Year of your own and another to Copy the Cluster defined Academic Year. An Academic Year must have been defined and made available by a Cluster user for this option to work.

Create Own Academic Year

- Select Data | Academic Year
- Click Add – the radio button by default will remain in Create Own Academic Year even if you have an option to copy from a cluster available.

The first section Academic Definition requires you to provide a name, start date and end date for the new Academic Year.

Note: The mandatory fields in this section are the only ones which need to be completed in order to save the Academic Year – the terms and inset days can be added at a later date – please note however, that they must be completed before the dates actually arrive.

- Fill in a name for the Academic Year – the recommended format is Academic Year 2017/2018

Note: By default the Start Date is taken as the date immediately after the End Date of the previous Academic Year and the new End Date is set a calendar year later. Don’t change the start date so there is a gap, if you need to make the new academic year start earlier or later, cancel here and amend the end date of the current/previous academic year first so the new one defaults correctly next time.

- Check the default Start Date is early enough for your first day back at school – amend the date correctly if it isn’t
- Check the default End Date is correct – click the calendar icon or overtype in the same date format to select a different date

The Start and End Dates are populated by default from those used in the previous Academic Year.

Dates cannot overlap Academic Years; therefore, if you wish to start your new Academic Year earlier, then the End Date of the previous Academic Year must be adjusted first.
• Click **Save**
• Click **Yes** to the confirmation message that appears

![Confirmation](image)

A success message will then appear stating that the record(s) have been added successfully.

• Click **OK**

You will then see the new Academic Year showing in the Academic Year list view.

**Copy Cluster Defined Academic Year**

• Select **Data | Academic Year**
• Click **Add**
• Select the **Copy Cluster Defined Academic Year** radio button

**Note:** If a Cluster defined Academic Year wasn't available to you at this point, a message would appear to warn you that is the case. If an Academic Year from the Cluster is available, the predefined information will be made available and shown in each section.

• Check the details and amend according to your individual school’s requirements by selecting a term or term break and clicking the **Edit** button
• Click **Save** when you are happy to use the Academic Year details
• Click **Yes**
• Click **OK** when you get a message stating that the record(s) have been added successfully
• You will then see your new Academic Year showing in the Academic Year list view.
• Select the **2017/2018 Academic Year** and click **Edit**

You will see several sections which can be worked through in turn to further define the new academic year.

**Academic Year Definition**

This section allows you to edit the academic year details you have just defined should you wish to do so at any point. You can edit the name or change the end date accordingly until the year starts. The start date is greyed out as this is determined by the end date of the previous academic year.

**Adding Academic Terms**

This section allows you to add and/or edit academic terms. Each term date should be entered according to its start and end date – e.g. the Autumn Term, the Spring Term and the Summer Term.

• Expand the Academic Term(s) section by clicking on the section header
Initially there will be no records to display – click Add to add the first Academic Term
Enter in a Name for the term and a Start Date and an End Date for the term

Click Save once this is correct or Cancel to start again

You will see the term added to the section.

Repeat as above until you have added all the term dates required

Add Academic Year

Term Break(s)/Midterm Break(s)

As you created the term dates, Progresso in the background automatically defined the Term Breaks which will take place between the terms – e.g. the Christmas holiday, the Easter holiday and the Summer holiday.

Using this section, you can re-name those term breaks that are automatically defined and further create midterm breaks.
Should you wish to rename a Term Break:

- Select it and click **Edit**
- Change the Name and click **Save**

To add a Midterm Break:

- Click **Add**
- Type in a **Name**, **Start Date** and **End Date**
- Click **Save**

Repeat until you have all the Midterm breaks required.

**Note:** Each section can be reduced once you have completed it to save on space by clicking the header again.

**Week Structure**

This section allows you to define which sessions of which days of the week are ‘in use’ and should count as school days for roll call attendance purposes. For example, if your school opens on Saturday morning and you expect learners to attend then you can set AM only on Saturday.

Typically, this section should be correct anyway but double check and change if required.

**Academic Calendar Events**

This section allows you to add other days which will have an impact on your academic year and attendance requirements – e.g. inset days and unexpected school closures.

A graphical representation is provided to show what is happening. To add an Academic Calendar event:
Click **Add**

- Type in the **Name** and the **Start and Finish** dates – it is possible to enter events spanning more than one day, e.g. 2 Inset Days together
- Select a **Category** (each event must have one) - there should be sufficient categories already provided by default but it is possible to add your own (Data | Setup Master Data | Data | Academic Calendar Category)
- Select whether the event should be applied for a **Full Day or Half Day** (e.g. am only or pm only session)
- Click **Save**

The graphical representation will be updated and the event will be added to the list view. Repeat as above until you have added any events you need to at this time. The Academic Calendar can be updated throughout the year.

If you have an emergency closure day, it is possible to send SMS or Email notifications after adding the event.

If you wish to record absences for staff but not teachers during dates now marked as school holidays, you can create Academic Calendar Events with a category which expects staff attendance but does not expect learner or teacher attendance.

- Once you have completed all of the possible setup steps you can, click **Save**
- Click **Yes** to the confirmation message, then **OK** to the success message.

Your Academic Year is now created and saved and you are ready to continue with Academic Progression.

Setting up the academic year is necessary before using TimeTabler, however, Academic Progression can be completed now or at a later stage so it features slightly later in these notes.
Further Core Data Preparation

There are some areas of core data which will be used in the timetable that can only be setup and edited in Progresso. Once setup, this data can be exported for TimeTabler to ensure the codes match when the file is imported (if the codes do not match exactly the import will not work). Much of this data is used in other areas of Progresso so it is worth setting them up in conjunction with users of those areas – e.g. Exams Officers, Data Managers and those responsible for Assessment.

Subjects

It is possible for each school to choose the codes and names for their own subjects. As subjects will be used throughout the system for a variety of purposes including analysis, it is very important that as a school all stakeholders who use subjects agree on the codes that need to be used. That means consulting with the Exams, Attendance and Assessment officer for example. Additional subjects can be added should they be required.

Subjects can also belong to departments depending on the school preference, however, if subject codes and department associations are changed unreservedly then this can have an impact on assessment, examinations, analysis etc., as the Timetabler please appreciate you should not simply change the codes to your desired convention, this is also true of other colleagues. It must be decided at school level.

- Select **Data | Setup Master Data | Data**
- Select **Subject** from the drop down list

This will display a list of subjects which came with Progresso and also any that have been imported from/added by your school. You may notice that there are some subjects with different codes but the same name. In this case you can map your own school subject to the master subject code and delete the Progresso version of the subject to avoid confusion.
Each new subject created by the school should have a **Code**, **Name** a **Type** and be **Mapped** to a subject in the CBDS.

To enter a new subject:

- Click **New**
- Type **SPS** in the **Code** field (try and keep the code as short as possible)
- Type **Sports Science Level 2** in the **Name** field
- Select **Non-Core** (this is not used elsewhere in Progresso so you can have your own use/convention for it in the Subject area)
  Select **Physical Education / Sports** from the **Mapped to** combo box
- Click **Save**
- Click **OK**

The subject will be added to the list.

- To delete a subject which you don’t wish to use, select the radio button and click **Delete** then click **Yes** and **OK** to the messages. Should you attempt to delete a subject which is actively is use elsewhere in Progresso you will receive the following error message;

  ![Error](image)

**Note:** When a file has been extracted for TimeTabler, it is important that either no changes are made to subject names or codes until it has been imported or that those changes are matched and also made in the TimeTabler file.
Course Subjects

Once subjects have been added, it is advisable to associate subjects with courses to provide filtering of subjects in other areas of Progresso – e.g. when creating teaching groups for KS4 mapped subjects will appear in a separate section at the top of the list.

- Select Data | Academic Data | Course Subject Mapping

Course Subject Mapping

If you are no longer teaching a subject in a key stage and wish to un-map it;

- Select the radio button for a course and click Map Subject
- De-select the subject(s) you wish to un-map and click Save
- Click OK

Teachers/Staff

Staff Records must be created and maintained within Progresso. Staff records can be added in TimeTabler but they must also exist in Progresso with the same details for the import routine to work when attempting to match them.

Staff records are date based and active records must have a unique code (which is automatically created upon saving).
Adding a New Teacher

To create a new teacher record:

- Select People | Staff

Staff List

<table>
<thead>
<tr>
<th>Surname</th>
<th>Forename</th>
<th>Photo</th>
<th>Title</th>
<th>Staff Code</th>
<th>Status</th>
<th>Department</th>
<th>Timetable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windrum</td>
<td>Catherine</td>
<td></td>
<td>Mrs</td>
<td>CVY</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Celena</td>
<td>Charli</td>
<td></td>
<td>Ms</td>
<td>MRC</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alix</td>
<td>Charlie</td>
<td></td>
<td></td>
<td>CA</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>French</td>
<td>Charlotte</td>
<td></td>
<td>Mrs</td>
<td>CF</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bailey</td>
<td>Charlotte</td>
<td></td>
<td>Mrs</td>
<td>ZVb</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cussi</td>
<td>Charlotte</td>
<td></td>
<td>Ms</td>
<td>CC1</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Geeson</td>
<td>Chris</td>
<td></td>
<td>Mr</td>
<td>CI</td>
<td>Active</td>
<td>Physical Education</td>
<td></td>
</tr>
<tr>
<td>Martin</td>
<td>Chris</td>
<td></td>
<td>Mr</td>
<td>CMA</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Andenas</td>
<td>Christelle</td>
<td></td>
<td></td>
<td>CAn</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Click Add
- Type Carson in the Surname field
- Type Scott in the Forename field
- The ID is automatically generated but you can overtype this if you wish
- Enter a Start Date – this can be a future start date
- Click Save

The system will automatically check to ensure that the ID entered for the teacher is unique amongst active and draft records. If the code is not unique then you will see an error message.

Where display IDs are in use by an active staff member, another ID must be chosen.
If the ID is not in use on another active or draft record, a success message will appear (codes used previously on records which now have a status of Left can be used again).

- Click OK
Notice that each record has a Status:

**Draft** – this will be allotted to a record which has been created but is not yet active according to the start date (future date or blank)

**Active** – this will be allotted to a record which has been created and is active according to the Start Date and Date Left

**Left** – this will be allotted to a record which has a leaving date assigned which is already in the past

When using the Manual Event Override functionality in Progresso and the Cover functionality, in order to show teachers of the same subject or teachers who are free, they must also have been assigned a ‘Teaching Position’ in the **Position** drop down.

The Position drop down is defined in **Setup Master Data | People | Staff Position** – there are some Progresso system defined positions which can’t be edited, however should you wish to clone/create a new position and set the Type as Teaching then staff assigned that position will appear when searching for free teachers in Progresso.

**Sites and Rooms**

Largely these will remain static but you may be having building works or moving to a new site and find it necessary to create new rooms or even sites.

**Sites**

If a site is not present it is not possible to set up Rooms. Most schools operate on a single site - individual blocks within a site are not set up as separate sites. If you do have a split site school, you can set up additional sites.
Progresso comes with a ready set up Site called Main which can be used as the default if you only have one site.

To add a new site:

- Select **Data | Site, Rooms & Equipment | Sites**
- Click **Add**
- Fill in a **Code** – e.g. PRI
- Fill in a **Name** – e.g. Primary
- Click **Save** then click **OK**

**Site Creation Details**

- **Site Code:**
- **Site Name:**
- **Site Address:**
- **Site Primary Contact:**
- **Site Phone Number:**

Details of the site will be displayed in the list view.

The import won’t look at site, it will match on Room Code so if you do have a split site try and make sure there aren’t rooms with the same code on both sites.

**Setting up Rooms**

Each Room requires a Site, Code, Name, Room Type and Capacity.

To enter details of a new room:

- Select **Data | Site, Rooms & Equipment | Rooms**
- Click **Add** (notice the **Site** defaults to Main)
- **Type L36** in the **Code** field
- **Type Art** in the **Name** field (this can be the same as the code or it can be a longer description)
- Select **Lower School** from the **Site** combo box
- Select **TTCLASS** from the Room Type combo box
- **Type 30** in the **Capacity** field (if you wish - the capacity is the number of students that a room is capable of holding)
- Click **Save**
- Click **OK**

**Room Creation Details**

- **Room Type & Capacity**
  - **Room Type:** TTCLASS
  - **Capacity:** 30

You will be returned to the list view and the new room will now be displayed.
Each Room must be given a unique code. If this is not done the following message will be displayed:

- There are errors with your entries. Please check the error list and make any required changes.
- This Room Code already exists. Please enter a unique Room Code.

An error message will also be displayed if a room is entered without any of the mandatory details.

**Note:** If you are using rooms in other areas of Progresso such as Exams and Behaviour then it will be necessary at some point to setup the additional room types and their accurate capacities for other areas of the system to use. This can be done at a later date when the information is known.
Timetable Sources, Setup and Date Mappings

Within Progresso, each timetable must have its own source – **this source will be created as part of the import routine.**

Each source can have its own day structure, its own number of iterations and its own set of events – **the day structure will be created as part of the import routine.**

**Teaching groups are linked to timetable sources based on the start and end dates of both and the subject of the teaching group matching in both.**

When the import is creating the source, it must have a start date and according to the number of iterations, a finish date – these must sit within the academic year start and finish dates.

In turn teaching groups that you wish to use for a particular timetable must have start and end dates that sit within the timetable source start and finish dates so they all tie in together.

**The day structure, timetable source start date, the number of iterations (how many times the cycle repeats during an academic year) and the date mappings will all need consideration to ensure that the hierarchy of dates is correct so that the teaching groups can be matched during import so please pay particular attention to this part of the setup in TimeTabler and the import.**

_The below scenario would work as the teaching groups are within the source which is within the academic year and the day structure is Monday to Friday._

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>27/08/2017</th>
<th>24/08/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timetable Source</td>
<td>04/09/2017</td>
<td>24/08/2018</td>
</tr>
<tr>
<td>Teaching Groups</td>
<td>04/09/2017</td>
<td>24/08/2018</td>
</tr>
</tbody>
</table>

It is recommended you run your teaching groups past exam results days in August to make it easy to run reports for active groups.

Once the timetable has been imported, the date mappings can be amended accordingly should you need to remove some days from the beginning or end of the timetable source.

If you run a two week timetable you will also need to adjust the week sequence (e.g. a, b, a, b, a, b) so that after a one week holiday school returns to the correct week of a timetable but again, this is easier done once in the main date mappings screen once the file has been imported.

Please see Appendix 1 for further instruction on date mapping.
Academic Progression

Once the dates for the new Academic Year have been defined it is possible to carry out some or all of the Academic Progression. This will allow you to ensure years are mapped correctly to courses for group creation, progress teaching groups (should you wish to do so) with the correct dates, and make them available for matching on import and progress learners to ensure they are in the correct groups.

- Select Data | Academic Progression

The process is broken down into steps which should be completed in turn. It is essential that you check the settings thoroughly and ensure the data is correct before moving on to the next section as it is not possible to re-visit some sections. For example, once you have created new groups, the Course Year Mapping and Course Year Promotion sections are greyed out. You must at the very least carry out steps 1 and 2.

Should you wish to do so, you can progress the teaching groups, along with the population of learners – e.g. 7A/Ar becomes 8A/Ar – this will save time repopulating groups where the population will largely remain the same and if the group codes are the same the import will match them to the TimeTabler file.

If you wish to start teaching groups from scratch in terms of coding them and populating them, you can create the teaching groups via the import teaching groups process or manually and code them based on the naming convention being used in TimeTabler and manually populate them with learners. This is a time consuming process however, so fine for the odd group here and there but not recommended for all groups.

Whatever you decide to do for teaching groups, you will need to map promotion paths for learner promotion and it’s also likely that you’ll be able to promote registration groups.

Course Year Mapping (Step 1)

This section allows you to map School Years to Courses and is the mechanism by which the Academic Structure of your school is defined in the new Academic Year.

For example, if your school has decided to move Year 9 into Key Stage 4 then you must re-map it here before continuing.
Check that all required Years are mapped to their correct Course
If no changes are required and everything remains the same, just click **Save**
To map any un-mapped Years, click in the Mapped Year(s) line for the appropriate Course and choose a year from those available in the drop down
To re-map a Year, select its current Course and click in-line to activate it
Click the ‘x’ on the Year concerned to remove it from that course
Click in-line for the new course and it will be available to re-map
Click **Save**
Ensure you see the successful save banner

Once you have saved this step you can move on to step 2 – click the numbers on the step pathway.
Set Promotion Path (Groups & Learners) (Step 2)

This section of the Academic Progression allows you to map years for progression – for example, KS3 Year 9 into KS4 Year 10. This step of the process doesn’t move actual learners from class group to class group or at this stage create the groups, it simply determines the mapping of the pathway.

- Select step 2 – Set Promotion Path (Groups & Learners)
- All years listed, must be mapped before you can continue
- By default, numerical years will be picked up and mapped forward – e.g. 10 will go to 11
- Any which cannot be mapped and those years which are set to ‘Leaving’ must be mapped manually
- Where a year group will be leaving – e.g. 11 or 13 – select Leaving (this won’t actually mark learners as left but will mean that they won’t be moved forward into future groups)
- If you have a sixth form and there may be some learners who will progress, move year 11 to year 12 at this point then any who don’t actually return can be marked as left but those who do can be put into new year 12 groups
- Next Year is dependent on Next Course
- To map a year, click in-line in the Next Course to select a course then select a Next Year if appropriate

- Ensure all years are mapped to a
  Next Year
- Click Save
- Click OK
Teaching Group Progression (Step 3)

This section allows you to progress teaching groups with their current learner populations into the next academic year – e.g. year 10 groups become year 11 groups and continue running on the curriculum.

The learner populations will also be progressed and once the new groups are created, those populations can be changed if learners need to move groups.

Progressing groups means you don’t have to create and populate them from scratch.

For new cohorts (e.g. year 7) or where curriculums change dramatically (e.g. year 12) you will have to create and populate those groups from scratch.

**Note:** You only need to progress Teaching Groups should you wish to have them already in existence and with learner populations to match on import.

- Select step 3, Teaching Group Progression

All teaching groups which belong to a year group set to progress will be in the list – it is advisable to manage a year group at a time. Each column can be sorted by clicking on the header and each column with the filter icon has in-column filtering options available.

All groups being progressed must have a start date and a finish date and these dates must be equal to or within the timetable source. The dates must be set on this step and can be entered in bulk.

By default, any teaching groups in current year 7, current year 8, current year 10 or current year 12 will be set to ‘Create Group’ but no dates will be defaulted.

To progress teaching groups, you must select ‘Create Group’, set a ‘Start Date’, select a ‘Finish Date’. You must also check the settings for ‘Include Learners’ and ‘Include Teachers’. The years which default to create also default to include learners. No years default to include teachers as part of the integration routine.
Vertical groups (those with no course and no year associated) can be progressed and where the Code for the following year doesn’t begin with a number, it will be editable.

<table>
<thead>
<tr>
<th>Code</th>
<th>Year</th>
<th>Code</th>
<th>Subject</th>
<th>Start</th>
<th>Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>K55</td>
<td>10</td>
<td>K54</td>
<td>PSHE</td>
<td>5627</td>
<td>29/06/2016</td>
</tr>
</tbody>
</table>

- To filter to a year group – click the filter icon in the Year column for ‘Current Groups’
- Parameters for equal to, contains, and more are available
- Type in a value and click Filter to narrow down the list
- It’s possible to then sort by subject to select only those groups which can be carried forward

<table>
<thead>
<tr>
<th>Course</th>
<th>Year</th>
<th>Code</th>
<th>Subject</th>
<th>Start</th>
<th>Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>K54</td>
<td>10</td>
<td>K54</td>
<td>PSHE</td>
<td>5627</td>
<td>29/06/2016</td>
</tr>
</tbody>
</table>

- To select or de-select Create Group for individual groups, tick the in-line tick box
- To set or change a date, click in line for the Start or Finish field and either type in the date or choose from the date picker
- To bulk change several events in one go, use Shift to multi-select adjacent groups or Ctrl to multi-select non adjacent groups
- To bulk fill a selection box – e.g. Create Groups, Include Tchs, Include Learners – select the groups you wish to change and click the Bulk Fill icon at the top of the column

- Select/Deselect as appropriate and click Bulk Fill to update the selected groups
To bulk fill a date field – e.g. Start or Finish – select the groups you wish to change and click the Bulk Fill icon at the top of the column.

Once all of your teaching groups have the required settings, they are ready to be created, however, once groups have been created, it is not possible to go back and change steps 1 or 2, it is also not possible to undo the changes to re-create the groups with different settings.

It is possible to save your settings without creating the groups so that you or a colleague can double check they are correct before you save and create, or it is possible to save and create in one go if you are fully confident the settings are correct.

To save your changes and check everything is correct before you create the groups, click the Save changes icon.

The changes will be visible to any user with permissions to Academic Progression and will remain saved until you make changes to them. If you do make any changes on step 1 or step 2, the settings you have saved on step 3 will be cleared back to the defaults.

To save your changes and create the groups in one go, click the Save Changes and Create Groups icon.

The confirmation message warns you that once created, you can’t re-create the groups or change the course/year settings.

Click Ok to create the groups or Cancel to go back and make changes.

Once progressed and created, the groups are shaded green and un-editable so you know they have been progressed.

Nothing further can be done with the groups within Academic Progression once they have been progressed, however, they can be edited via Learner Groups | Teaching Groups (filter on start date).
Registration Group Progression (Step 4)

Along with teaching groups, registration groups can also be progressed into the following year. If groups are vertical they will remain as they are, with the same learners assigned, however, if they are horizontal (e.g., linked to a particular year) then they can be progressed to the following year. Vertical groups still need to be processed on the following step.

- **Select step 4 – Registration Group Progression**

Similar logic to step 3 is applied – any groups which have a current year mapped to a next year on step 2 and any vertical groups will be available for progression. By default, all groups are set to be progressed with learners and with teachers too.

- **Use Shift and Ctrl again to bulk select any groups you wish to bulk edit or edit individual groups in turn**
- **The codes for any groups which don’t start with a number can edited in-line in the grid**
- **Click Save to save any changes without creating the groups and return at a later date to create groups**
- **Click Save and Create to save any changes and create the groups**
- **The groups will turn green when they’ve been successfully progressed and from that point on, nothing further can be done with them in Academic Progression. However, they can be edited via Learner Groups | Teaching Groups (filter on start date)**
Learner Progression (Step 5)

This step provides information to you about the process of learners being promoted in the new academic year. It also offers the chance to increment the learner national curriculum year by one.

Learners will be promoted on the first day of the new academic year.

Only active learners will be promoted.

When adding new intake, add them as year 7 with a start date in the new academic year.

- If you wish to increment the NC Year for each learner on the first day of the new academic year, leave the default setting of ‘Yes’ and click Save
- If you do not wish to increment the NC Year for any learner on the first day of the new academic year, change the ‘Yes’ to ‘No’ and click Save

Increment NC Year?
- If you wish to increment the National Curriculum Year field for learners then select Yes from the drop down and click Save
- If you do not wish to increment the National Curriculum Year field for learners you must select No from the drop down and click Save
- The National Curriculum Year for every learner will be incremented by one on the start date of the academic year
- For any learners for whom this is not the case, the learner record will need to be edited manually
- The National Curriculum year will be incremented from what it is, not what it is expected to be based on actual year

Learner Progression Details
- Learners will be promoted according to the route set in the Promotion Pathways screen
- Learners will be promoted according to the year on their learner record
- Learners with a date of entry before the start date of the new academic year will be promoted
- Learners with a date of entry equal to or after the start date of the new academic year will not be promoted
- Learners will be promoted independently of groups
- Learners will be promoted on the start date of the new academic year
- You must mark learners who will be leaving as left independently of this process via the learner record
Creating New/Further Teaching Groups

Even if you chose to promote your existing teaching groups to match to the TimeTabler import then you will still have some new groups to create – year 7, year 10 options and any new/additional subject sets for example.

It is highly recommended that you create the groups ready for the import and let them be matched up automatically.

Teaching groups can be created manually or they can be imported via a data import using a spreadsheet if the columns are formatted correctly.

Each Teaching group needs (as a minimum) a Subject, Code, Name, Start Date and Finish Date.

It is not appropriate to associate a teacher with the group as the import routine will do this more efficiently as one of the steps.

You can create Teaching Groups in three ways – manually in bulk, manually individually or in bulk by data import.

To create a new teaching group manually proceed as follows:

- Select Data | Learner Groups or if going directly from step 3 or 4 of Academic Progression, click the ‘Navigate to Groups’ icon

Note: a default filter for the current academic year will be activated, in order to see the new teaching groups then you’ll need to amend the Advanced Filter to see 2017/2018 and remove the Active Teaching Groups filter.

- Ensure the Select Group Type radio button has Teaching Groups selected
- Click Add
Bulk Creation of Teaching Groups

Bulk creation is possible and works extremely well when creating groups in sets – e.g. Year 10 Maths sets 1 – 8 but when creating teaching groups based upon registration group or other more individual codes Bulk creation is not as effective.

- Fill in the Group Code (without the set number if creating bulk groups)
- Select the Start Date and End Date – these must fall entirely within the Source Dates for the new timetable
- Select the Course and Year or leave both blank
- Select the Subject
- Fill in the Number of Groups required – e.g. 8
- Select how you wish to increment the groups – e.g. by Number would provide 1, 2, 3, 4

**Add Teaching Group**

<table>
<thead>
<tr>
<th>Group Code</th>
<th>Group Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/Ma</td>
<td>10/Ma</td>
</tr>
<tr>
<td>04/09/2017</td>
<td>24/08/2018</td>
</tr>
<tr>
<td>Key Stage 4</td>
<td>Year 10</td>
</tr>
<tr>
<td>Mathematics</td>
<td></td>
</tr>
</tbody>
</table>

**Teachers:**
- MLN M Litton
- 180 E Uivesey
- PL P Lockyer
- JMLJ Long
- 5602 S Mackay
- LM L Manning

The Group Name is automatically populated and updated from the code.

- The above would create you 10/Ma1, 10/Ma2, 10/Ma3, 10/Ma4, 10/Ma5, 10/Ma6, 10/Ma7 and 10/Ma8
- Click Save and Exit
- Click OK to the success message which is then displayed and you are taken back to the teaching group list ready to click Add again and create further groups if required

Individual Creation of Teaching Groups

This method is for creating teaching groups with non-uniform codes, such as those named after registration groups.

- Fill in the Group Code (maximum 10 character)
- Select the Start Date and End Date – these must fall entirely within the Source Dates for the new timetable (created on import)
- Select the Course and Year if required
- Select the Subject
- Click Save
- Click OK
The code should describe the Teaching Group as concisely as possible. We recommend that each code should start with the Year and then be followed by the Subject code and then the set or group number. However, these will also need to match the code format of the groups being exported from TimeTabler to match them up so please bear this in mind.

**Note:** In Progresso teaching groups can have multiple teachers associated to them where split teaching occurs or for assessment reasons.

**Data Import of Teaching Groups**

It is possible to import teaching groups in bulk using a correctly formatted spreadsheet. The groups can be imported with learners in or as empty groups to be manually populated. If you are creating all groups or a significant amount of groups from scratch, then this is the easiest method to use.

**Note:** on the export of the TimeTabler file, a csv file which details teaching groups is also created, the code, subject and year for each group can be copied into the import file for Progresso to ensure and exact match. The file is typically exported to the same place as the xml file and is named ‘TG’.

**Spreadsheet**

The spreadsheet needs to have the following headings and must be in .csv format:

- No
- Group_Code
- Sub_Code
- Year_Code
- Learner_SName
- Learner_FName
- UPN
- Gender

The subject codes should match those you have in Progresso.

**With Learners**

To import the group with learners, then each group needs a row per learner and the learner Surname, Forename, UPN and Gender need to match those in Progresso exactly for the import to be successful.

**Without Learners**

To import the basic group detail with no learners, then each group only needs one row and the learner details can be made up – the learner details can then be skipped and the teaching group imported empty.
Import

Select Data | Import Data | Teaching Groups

Step 1 – Select Facility Options File

- Browse to the location of your spreadsheet and select it for import
- Select the 2017/2018 Academic Year
- Click Next
- Click Yes to the confirmation message regarding Year 10 options
- Click Close if you get a message about mappings

Step 2 – Map Imported Subjects

If there do happen to be any subject codes which do not match, step 2 allows you to map them. Choose the appropriate subjects and click Next or just click Next
Step 3 – Map Imported Learners

If you are importing just groups with no learners and used fake learner information, this step allows you to skip the learner records as there is no match and to go ahead with just the group import.

If you are importing learners with the groups, then the learner details must match up here to Progresso.

If you have some learners who do match and some who don’t you can skip the ones who don’t match and continue with the import, then the learners who were skipped must be manually placed into the teaching groups.

Step 4 – Transfer Teaching Groups

It is important on this step that you get the dates within the source so that the import from TimeTabler can find them to match up – use Bulk Fill to get the dates correct.

- Select all groups
- Click Transfer Teaching Groups
Further Population of Learner Groups

Learner group populations (teaching groups and registration groups) for the new academic year are set at the point of creation where they are promoted where learners are included and are empty otherwise or for brand new groups; therefore, changes will need to be made to update teaching groups for the new academic year. There are some different methods of doing this to best suit the type of populations you are changing/updating.

This does not need to be done prior to the rest of the timetabling process nor does it have to wait until the file is imported and the timetable created – it can be done any point from which you have the groups set up and the population available to you.

Group Matrix

In order to update the population of learner groups and swap learners between groups you can use the Group Matrix grid as described in the Learner Group Progression section above. This allows you to view learners to be assigned on the left, a selection of teaching groups in the same matrix and which learners are already assigned to those groups.

- Select Data | Groups | Learner Groups
- Use the Advanced Filter to filter to a year or subject that you wish to update the groups of
- Select the groups you wish to update the learner populations for
- Select More Actions | Group Matrix

- Use the Advanced Filter to select the learners you wish to assign – e.g. Year 7
- Use Add Learner Details to change the information available for learners
- Use the Learners can be member of only one group check-box if assigning to blocks or don’t if assigning to multiple linear groups
- Select the learners you wish to assign and the group you wish to Assign To and click Save – they will move from the list
- If moving learners between groups, you either click and drag them from one group to another – there is no need to save here, the change has happened
- You can also select the learner(s) and Select the new group at the bottom before clicking Save to move them over
- Select and click Remove to remove learners from a group
- Rollback if required, will roll back all the changes made to group populations in that session
Note: You can filter to Learners with a status of Draft to find new learners to assign to groups.

Bulk Assign Learners to Groups

In order to bulk assign a particular cohort of students to one or more teaching groups, use the Assign Learners button.

This is particularly useful if subjects share group populations – e.g. once the registration group 7A has been populated using the matrix, any teaching groups which are also taught as the 7A population can be populated directly from the one group.

- Select Data | Groups | Learner Groups
- Use the Advanced Filter to filter the records to a particular year or subject for which you wish to update the groups
- Sort by Group Code
- Select the group (i.e. if in a block) or groups (i.e. if all sharing the same population of students such as tutor group) for which you wish to update the learner populations
- Select Assign Learners

You will then be presented with a list of learners who can be selected and assigned to the selected group(s).

- Use the Advanced Filter to select the population of learners you wish to assign to the chosen group(s) – e.g. if they are taught in tutor group population then you can select a tutor group, or if they are taught according to the setting of another teaching group you can select that teaching group
- Change the Records Per Page drop down to accommodate all learners in the group
- Select all learners or just those required
- Click OK

The group(s) will then be populated accordingly.
Assign / Amend Populations by Group

It is also possible to change learner populations on an individual group basis.

- Select Data | Groups | Learner Groups
- Use the Advanced Filter to filter to a year or subject that you wish to update the groups of
- Select the group you wish to update the learner populations for
- Click Edit

The group details will be displayed along with a list of learners – it is possible from here to bulk or individually assign or remove learners.

To remove learners;

- Select any learners you wish to remove from the group (select all to empty it)
- Click Remove Learners
- Click Save

To assign learners;

- Click Assign Learners
- Use the Advanced Filter to select the learner(s) you wish to assign
- Select the learner(s) and click OK (note, if you select a learner from outside of that year group a warning will be displayed)
- Click Save
System Settings

In order to set Progresso to work with a TimeTabler import then the default setting needs to be checked. Do this **before** you import the file.

In Progresso;

- Select **Timetable | Manual Event Override Settings**
- Expand the **Other Settings** node

**System Configuration**

<table>
<thead>
<tr>
<th>Clash Settings</th>
<th>Other Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Default Source:</strong></td>
<td><strong>Timetable 2018/2017</strong></td>
</tr>
<tr>
<td><strong>Default Day Composition for Timetable and Cover:</strong></td>
<td><strong>Day Composition</strong></td>
</tr>
<tr>
<td><strong>Default Scheduler:</strong></td>
<td><strong>TimeTabler</strong></td>
</tr>
<tr>
<td><strong>Default Day Composition for Detention:</strong></td>
<td><strong>Select</strong></td>
</tr>
</tbody>
</table>

- Select **TimeTabler** from the Default Scheduler drop down
- Click **Save**

**Further Settings – After the Import**

Once the new timetable has been imported and once the old academic year has finished, you can check/set the **Default Source** so it is the newly imported timetable source and the **Default Day Composition for Timetable and Cover** to ensure it is the newly imported day composition.

You can also navigate to **Timetable | Release Timetable** and release the timetable to different roles to let them know it is completed and is available. (Note: you only ever need do this once).
Export Core Data Codes

It is possible to export details for staff, rooms and subjects to read in to TimeTabler to ensure that when you import your timetable the codes match exactly and the import can progress successfully.

It is highly recommended you do this.

- Select Timetable | Extract Timetable
- Select the date of the new academic year
- Click Download File for TimeTabler

**Export Source for TimeTabler**

Export rooms, teachers and subjects to TimeTabler.

*Export Teachers Active as On: 01/09/2017*

- Save the downloaded .csv file somewhere accessible
- Once in TimeTabler it can be imported via File | Import Basic Data from a file

Once the basic data has been imported the schedule can be created in TimeTabler.

**If data is added manually to TimeTabler, please ensure it matches up with Progresso.**

**It is important your teaching groups codes match so please also take this in to consideration when generating teaching groups for export.**
TimeTabler – New Import

- Select TimeTable | Integrate Timetable

Step 1 – Select a File

- Click Choose File
- Navigate to the TimeTabler exported file you have to import
- Select it
- Click Next>

Import Timetable from TimeTabler

1. Select a File
2. Source Creation
3. Date Mapping
4. Teaching Group Association
5. Assign Teacher to Teaching Groups
6. Generate Timetable

*Timetable Generated SIF File: TTX-TIM.xml (Remove)

It is at this point that any records which are a mismatch will be flagged up and you will not be able to proceed any further without creating them in Progresso to match TimeTabler or amending them in TimeTabler to match Progresso.

The validation message will flag up any teachers, rooms or subjects which don’t match and advise you which codes/names are causing the problem(s).
• Print if you wish to have a list of the issues
• Click OK
• Amend either record to resolve the mismatch – it is advisable to change the subject in TimeTabler or by editing the xml file rather than Progresso if possible as other modules in Progresso may be using the subject as is
• Try again from Step 1

Step 2 – Source Creation

This step will create the new timetable source in Progresso for you. The initial import will create all of required elements of the timetable source for you.

• Leave Create New Source selected
• Type in the Code you want for the new timetable (this can be different to the label taken from the TimeTabler file) – e.g. TT17-18
• Type in the Name you want for the new timetable (this can be different to the label taken from the TimeTabler file) – e.g. Timetable 2017-18

• The Start Date will be taken from the TimeTabler file and will need to be the start date of the date mappings so ideally a Monday

• The End Date will also be taken from the TimeTabler file so should match and ideally be the last day

• Timetable Iterations need to be set so the source runs for the correct number of weeks from the start date until the end date (note if you have a two week timetable a week is two calendar weeks rather than one)
Step 3 – Date Mapping

The dates here need to be mapped to match the Start Date and Finish date on Step 2. Once imported, the date mappings can be updated under Timetable | Date Mappings.

If you have a two-week timetable here, you can re-map the half term holidays to retain consistency between the week A week B pattern.

- If you don’t have weekends included in your date mappings here, tick Skip Days for Sat and Sun
- Click Apply

Scroll down and check the last date in the mappings is the same as the Finish Date on the previous screen – if not, click Previous and amend the date before moving back to step 3 to start again.

- Click Next
Step 4 – Teaching Group Association

This step of the import process will match teaching groups where the codes and the subjects are exactly the same.

Teaching group codes must match exactly.

Teaching group subjects must match exactly with those used in TimeTabler.

Teaching group start and finish dates should fall within the start and finish dates for the timetable source (and hence date mappings).

If a teaching group exists but is mismatched and isn’t automatically found, then you may be able to match it from the drop down.

If a teaching group doesn’t exist, then you can create it via this process by typing in the code in the New Teaching Group box.

You must match all groups to something or create a new one on this screen in order to continue.

If all groups match, then there is no need to do anything further on this screen.

- Click Next
Step 5 – Assign Teacher to Teaching Groups

This step will map any teachers on the events in TimeTabler to the teaching group in Progresso.

Import Timetable from TimeTabler

It is not feasible to check them all but check some just to be sure all is well.

- Click Next
Step 6 – Generate Timetable

- Click **Generate Timetable Events**

**Import Timetable from TimeTabler**

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
<th>Step 4</th>
<th>Step 5</th>
<th>Step 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select a File</td>
<td>Source Creation</td>
<td>Date Mapping</td>
<td>Teaching Group Association</td>
<td>Assign Teacher to Teaching Groups</td>
<td>Generate Timetable</td>
</tr>
</tbody>
</table>

**Timetable Details**

- **Source:** 2017/2018
- **Start Date:** 04/09/2017
- **End Date:** 27/07/2018

Please click Generate Timetable Events button to generate the Events in Progresso.

The timetable for source Schedule has been successfully generated in Progresso.

You can view the timetable by clicking the View Timetable button. The timetable will be visible to authorised users after it has been released.
After the Import

Some things to check.

Default Source and Day Composition

Once you have finished the current year/timetable and moved on to the next:

- Select Timetable | Manual Event Override Settings
- Select the source the import created as the Default Source
- Select the day composition the import created as the Default Day Composition for Timetable and Cover
- Click Save
- Select Timetable | Release Timetable

Learner Groups

Ensure you have correctly populated learner groups for 2017/2018 so that all learners have a timetable as full as it should be.

Release the Timetable

- Select Timetable | Release Timetable
- Select each role and click Release (this only needs to be done once, when you initially have the new timetable and will allow users to see the timetable across all areas of Progresso)

View and Print Timetables

- Select Reports | View Reports | Timetable

A suite of timetable reports are available for checking clashes, finding learners with missing lessons and for printing off timetables – all begin with AL_.

Advanced, The Mailbox, 7 Commercial Street, Birmingham B1 1RS
T: + 44 (0) 1233 722700
E: learning.enquiries@oneadvanced.com
www.oneadvanced.com
Updating Schedules

Once your timetable has been integrated, it can be updated either in Progresso or by importing a fresh updated copy from TimeTabler.

However, please note that there is no export/import pattern, it’s only possible to import changes from TimeTabler which won’t have been updated with an export with changes from Progresso. Therefore, when you import an update all events will be updated based upon the TimeTabler file and any changes made in Progresso may be lost.

To update an existing source rather than import a new one:

- Select **Timetable | Integrate Timetable**
- Select the xml file on Step 1
- On Step 2, select ‘Overwrite Existing Source’
- Select the ‘Timetable Effective From:’ Date
- Select the schedule to be updated
- Click **Go**

**Note:** if you are updating a current source, then you will only be able to do so for a date >= the current date, if you are updating a future source then you will only be able to do so from a date within that source.
### Import Timetable from TimeTabler

**Step 1: Select a File**

**Step 2: Source Creation**

- **Step 3: Date Mapping**
- **Step 4: Teaching Group Association**
- **Step 5: Assign Teacher to Teaching Groups**
- **Step 6: Generate Timetable**

- **Overwrite Existing Source**

  Timetable Effective From: 04/09/2017

  - **Go**

**All manual events created after this date will be deleted.**

<table>
<thead>
<tr>
<th>Source Code</th>
<th>Source</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>Schedule</td>
<td>04/09/2017</td>
<td>27/07/2018</td>
</tr>
</tbody>
</table>

- Continue through each step – the teaching group association on Step 4 should be no different, if you have added groups, they will need the correct date range and an exactly matching year and code.
- Generate the timetable at the end
Appendix 1 – Two Week Timetable Date Mappings

In order to map two week timetables correctly over a half term when you have one week holiday, it is necessary to adjust the date mappings to retain consistency of weeks before and after the holiday.

For example, should you finish on a Week B before the October half term and wish to return to school on a Week A, the date mappings will initially see you finishing on a Week B, have the half term dates mapped to a Week A and returning on a Week B.

Remapping will skip the dates for half term altogether, meaning that you finish on a Week B and return on a Week A. The school will be marked as a school holiday in the academic year for the half term week and therefore wouldn’t show you a timetable for that week anyway.

Once the dates are initially mapped correctly from start to end during the import process you can follow the process below and remap around half term.

- Select Timetable | Setup Timetable | Source
- Select the new 17/18 timetable source
- Select Date Mappings
- Scroll down and find the first half term holiday – it will be shaded in blue if the academic year has been set up fully
- Select the first day that you would remap – this would be Sunday or Monday depending on your day structure
- Select the date of the first day back – this would be the date of the Sunday or Monday of the first week back after half term
In the example above half term will start on 30/10/2016 so it is in iteration 5 and the day structure starts on Monday so the remapping will need to start from iteration 5 on Mon1 for the following Monday, which will be 06/11/2016 when learners return to school.

- If you don’t have weekends in your day structure, Skip Days Sat and Sun
- Click Apply
- Check the changes are correct

Notice the New Date and New Day mappings reflect that the Mon1 will now be when school returns rather than during the holiday.

- Click Save if you are happy with the changes.

This needs to be repeated for each one week holiday – typically February and May will follow on from October. The two week holidays such as Christmas and Easter will work out as they should by themselves without any re-mapping required.

Note that when remapping, you may need to remap from a SunB or Mon B rather than a SunA or a MonA and you may need to Skip Days.

**Note:** Apply and Save will need to be confirmed after each week re-mapping.

Once all of the week holidays have been remapped, the date mappings may extend further than originally intended and now sit outside of the academic year which is not possible. Depending on how many iterations you included initially in the Source setup, you may need to remove some from the end.

Scroll down to the end of the date mappings to check the last date – this will be the end date for the timetable source.

The date must be within the academic year, but beyond the end date of teaching groups, hence having an end date of July for teaching groups.

- Select **Remove Timetable Iterations from the End of the Source** from the Operation drop down
- Fill in the number of iterations you need to remove – e.g. 1
- Click Apply to check the date is within the academic year but after the end date of your teaching groups
- Click Save

**Note:** using this method you can only remove whole iterations so a week A and a week B in one go, you can’t remove half of the iteration or un-map any dates.

If you need to remove only a week B or just some days then click the x icon by the individual day and remove them day by day.
To remove a whole iteration – e.g. Mon1 to Fri 2 use the **Operation** drop down at the top of the screen.

To remove only a week 2 click the individual icon by each day in turn and wait for it to delete.