

## FileMaker Program Planning Sheet Templates (version 1.0.3)

This FileMaker file allows you quickly produce personalized program planning sheets for your students. Key features are:

- Each sheet has the student's MyEd login info and current schedule (with option to include current marks)
- Multiple templates can be created quickly and easily
- Students can be filtered by grade, homeroom, and/or current courses so that they receive the correct template
- Student sheets can be sorted by alpha, homeroom, or by teacher in a selected period to facilitate distribution
- PDFs can be created as a group for printing, individual files for emailing, or a generic blank form

### 1. MyEd Extracts

You will need a few CSV files from MyEd. You may need to create field sets for this if this is the first time you are using this file. For all three files, you should select the required field set and choose "CSV" from the printer icon in MyEd. Here are the three field sets that you will need to export:

#### a. Student Top Tab **(UPDATED Dec 2021)**

The screenshot shows the 'Student Top Tab' configuration window. At the top, there are two input fields: 'Name' with the value 'Program Planning Sheet Info' and 'Owner' with a dropdown menu showing 'Cambie Secondary'. Below these are two main panels: 'Available Fields' and 'Selected Fields'. The 'Available Fields' panel has a dropdown menu set to 'Student' and a list of fields including Identifier, Photo, Legal last name, Legal first name, Legal middle name, Title, Globally Unique Identifier, Suffix, Globally Unique Identifier 2, Name, Gender, Globally Unique Identifier 3, Address, Date of birth (dd/mm/yyyy), and Pupil #. Between the panels are 'Add >' and '< Remove' buttons. The 'Selected Fields' panel contains a list of fields: Usual last name, Usual first name, Pupil #, Grade level, Homeroom, Home phone, Cell phone, Primary email, User > Login ID, User > Generated password, and ELL Level. To the right of the 'Selected Fields' panel are 'Up' and 'Down' arrow buttons. At the bottom are 'Save' and 'Cancel' buttons.

#### b. Schedule Top Tab > Schedules Side Tab

(You can also use the existing field set called "School Students – FMP Schedule Tool")

The screenshot shows the 'Schedule Top Tab > Schedules Side Tab' configuration window. At the top, there are two input fields: 'Name' with the value 'Student Schedules Export' and 'Owner' with a dropdown menu showing 'Cambie Secondary'. Below these are two main panels: 'Available Fields' and 'Selected Fields'. The 'Available Fields' panel has a dropdown menu set to 'Student Schedule' and a list of fields including Schedule notes, Section type, Globally Unique Identifier, Globally Unique Identifier SectionMark Identifier, Schedule term, Content term code, Master Schedule > Globally Unique Identifier, Inclusion?, Globally Unique Identifier SectionMarkInfo Ident, Schedule, Section number, Team, House, Platoon, and Master Schedule > Section type. Between the panels are 'Add >' and '< Remove' buttons. The 'Selected Fields' panel contains a list of fields: Student > Pupil #, Student > Usual last name, Student > Usual first name, Student > Grade level, Course, Section number, Schedule term, Schedule, Teacher, Description, and Classroom. To the right of the 'Selected Fields' panel are 'Up' and 'Down' arrow buttons. At the bottom are 'Save' and 'Cancel' buttons.

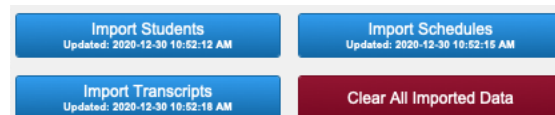
c. **Grades Top Tab > Transcripts Side Tab (UPDATED Dec 2021)**

(Set the Filter to **Current Year** and the Dictionary to **All**)

Note: This field set is only required if you want to include current marks on the program planning sheets.

## 2. Import Data into the FileMaker File

- Open the Program Planning Sheet Template File. You should be on the Template Setup layout.
- At the bottom, there are three blue buttons that you can use the import your MyEd data:



- Once you see the “Updated” date and time listed on each button, your data import should be completed.

## 3. Navigating the Templates Setup Layout

All templates are created from the “**Template Setup**” layout. There is no need to create or edit FileMaker layouts to use this file. Cambie’s templates have been left in the file as examples and you are free to edit and/or delete them as you see fit. On the left-hand side of the screen, you will see a list of your templates.

Version 1.0.0		<b>Edit Program Planning Templates</b>		<a href="#">+ Add New</a>
Grade 9 Program Planning 2021–2022				
Grade 10 Program Planning 2021–2022				
Grade 11 Program Planning 2021–2022				
Grade 12 Program Planning 2021–2022				

- Each template is listed by its title field (i.e., the title for the top of the page)
- To create a new blank template, simply click the green “**+ Add New**” button. You will be required to enter a title into the template before you can do anything else.
- To duplicate a template, click on this button: 

A new title will need to be entered as soon as you click this button as each template must have a unique title.
- To delete a template, click on this button:

#### 4. Editing Templates (Right Side of Screen)

**Grade 9 Program Planning 2021–2022**

**Course Selection Information** 1 column

**All students must be enrolled in a minimum of 8 courses.**

If the grade level of the required course listed below is incorrect, cross out the grade level and clearly write in the correct grade level.

**Required Courses**

- English 9
- Social Studies 9
- Physical and Health Education 9
- Science 9
- Math 9 (SELECT ONE)
  - ☐ Mathematics 9
  - ☐ Math 9 Adapted

**Elective Courses**

Students must select 1 Fine Arts and 1 Applied Design, Skills, and Technology (ADST) elective.

- Fine Arts: \_\_\_\_
- ADST: \_\_\_\_
- \* \_\_\_\_

\*Second Language is recommended for most students.

**Alternative Electives**  
(Please choose two)

- \_\_\_\_
- \_\_\_\_

**Current Courses List (Fields and Sort)**

Teacher: \_\_\_\_ Ter: \_\_\_\_ Sch: \_\_\_\_ Gra: \_\_\_\_ WH: \_\_\_\_

Sort: ☒ Term ☐ Schedule ☐ Title ☐ Teacher

**Note for Right-Hand Side**

**Please Note**

Students are strongly advised to speak with their current teachers for recommendations on which classes to take.

It is important to take time to select the correct courses on this form, as it is very difficult (often impossible) to make course changes at a later date.

**Note for bottom of page**


**Enter course selections ONLINE from January 26 to February 4, 2021.**

Please review your course selections carefully and sign below indicating your consent to the above course requests.

**Please return this form to the Cambie Office by Friday, February 5, 2021.**

- The first thing you will want to do is replace the logo. You can do this by clicking on the logo field and selecting your logo from your computer. Your logo only needs to be imported once and will appear on all templates.
- The four text fields (title, course selection information, note for right-hand side, and note for bottom) are all fully editable and represent the exact amount of space on the finished document. If your text is too long for the box (i.e., is cut off when you click out of the field), you will need to shorten it or reduce its font size to fit.
- Text formatting can be adjusted as needed and can be controlled from the “Format” menu or from the Formatting Toolbar:



If you can't see the formatting bar, you can click this button  on the top right of your screen or choose “Formatting Toolbar” from the View menu.

#### 5. Editing the Course Selection Information Field

- The course selection information field in each template can be formatted as one or two columns if needed by using the drop-down above it:

- There are two special shortcuts that you can use in this field:
  - Two underscores ( \_\_ ) will fill the rest of the current line with an underline.
  - Left and right square brackets ( [ ] ) will be replaced with a checkbox.

## 6. Editing the Note Fields

Both the note for the right-hand side and the note for the bottom of the page can be customized as needed. The title on the right-side note is also editable.

**Note for Right-Hand Side**

**Summer School/Online Courses**

Please list any full credit summer school or online course you plan to take:

—

—

After you have successfully registered for the summer school or online course, fill out a summer school declaration form and return it to your counsellor ASAP.

**Note for bottom of page**

**Enter course selections ONLINE from January 26 to February 4, 2021.**

Please review your course selections carefully and sign below indicating your consent to the above course requests.

**Please return this form to the Cambie Office by Friday, February 5, 2021.**

Both notes have the ability to use the underline and checkbox shortcuts as above and can also be formatted using the text formatting controls to suit your needs.

## 7. Setting up the Current Course List

Each student's sheet should include their current courses on the right-hand side. You can also display up to five additional fields below each course.

Options for the five fields can be accessed through the drop-down menus:

**Current Courses List (Fields and Sort)**

Teacher ▾ Ter ▾ Sch ▾ Gra ▾ WH ▾

✓ Teacher  
Term  
Schedule

Grade T1  
Grade T2  
Grade T3  
Grade T4  
Grade Single Term  
Grade Final

WH T1  
WH T2  
WH T3  
WH T4

For single term transcripts in 2021-2022:

- Grade 8 and 9 term marks will show as "Grade T1"
- Grade 10-12 term marks will show as "Grade Single Term"

You can also choose how you would prefer the list of current courses to be sorted:

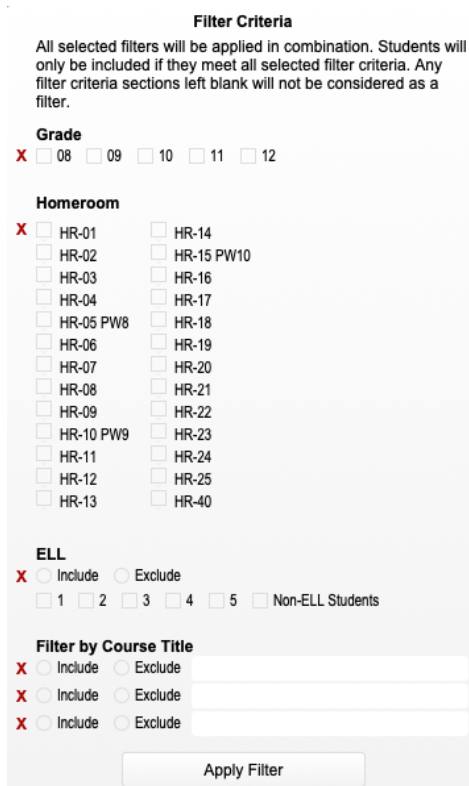
Sort: • Term • Schedule • Title • Teacher

## 8. Setting up PDFs of Program Planning Sheets

After completing steps 4 – 8 above for each of your templates, you are ready to produce your sheets. This can be completed through the layout called “**Create and Print PDFs.**” Everything that you need to do can be completed using the options at the top of the screen:



- To begin, choose a template from the drop-down next to your logo.
- Click on the **Filter** button to open the student filter popover window where you can select your filter criteria. As noted in the popover, you can create any combination of filters you like. Students will only be selected who meet ALL of the selected criteria. Sections left blank will not be considered when applying your filters.



**Filter Criteria**

All selected filters will be applied in combination. Students will only be included if they meet all selected filter criteria. Any filter criteria sections left blank will not be considered as a filter.

**Grade**

☒ 08 ☐ 09 ☐ 10 ☐ 11 ☐ 12

**Homeroom**

☒ HR-01 ☐ HR-14  
☐ HR-02 ☐ HR-15 PW10  
☐ HR-03 ☐ HR-16  
☐ HR-04 ☐ HR-17  
☐ HR-05 PW8 ☐ HR-18  
☐ HR-06 ☐ HR-19  
☐ HR-07 ☐ HR-20  
☐ HR-08 ☐ HR-21  
☐ HR-09 ☐ HR-22  
☐ HR-10 PW9 ☐ HR-23  
☐ HR-11 ☐ HR-24  
☐ HR-12 ☐ HR-25  
☐ HR-13 ☐ HR-40

**ELL**

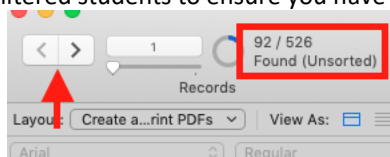
☒ Include ☐ Exclude  
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ Non-ELL Students

**Filter by Course Title**

☒ Include ☐ Exclude  
☒ Include ☐ Exclude  
☒ Include ☐ Exclude

Apply Filter

- The **ELL Filter** can either include or exclude students based on their ELL level. ELL levels are determined by the level listed on the student tab in MyEdBC.
  - The **Course Title Filter** allows you to find or exclude a group of students based on any text in the titles of their current courses. This will likely be helpful for things like French Immersion, Incentive, etc.
- Once you have selected your filter criteria, click “**Apply Filter.**” The number of found records listed on the status toolbar should immediately be updated to reflect the results of your filter. You can use the left and right arrow buttons to scroll through the filtered students to ensure you have the correct list:



If you don't see the expected students, you can update your filter criteria as needed until you are happy with the results. To find a particular student, you can also use Command-F to use FileMaker's find mode. Once in find mode, type your search criteria directly into the fields on the screen and then press enter or click “**Perform Find**” on the toolbar.

- d. Students can be sorted by a variety of criteria in order to facilitate handing out the sheets. Sorting is not needed if you are creating individual PDF files. Click on the “**Sort**” button to open the sort criteria popover:

**Sort**

Schedule Terms	Period
<input type="checkbox"/> FY	<input checked="" type="checkbox"/> 1-2(1)
<input type="checkbox"/> Q1	<input type="checkbox"/> 1-2(2)
<input checked="" type="checkbox"/> Q2	<input checked="" type="checkbox"/> 1(1)
<input type="checkbox"/> Q2 RT1	<input type="checkbox"/> 1(2)
<input checked="" type="checkbox"/> Q2 RT2	<input type="checkbox"/> 1(5)
<input type="checkbox"/> Q3	<input type="checkbox"/> 1(6)
<input type="checkbox"/> Q4	<input type="checkbox"/> 1(7)
<input type="checkbox"/> Q4 RT1	<input checked="" type="checkbox"/> 2(1)
<input type="checkbox"/> Q4 RT2	<input type="checkbox"/> 2(2)
	<input type="checkbox"/> 2(5)
	<input type="checkbox"/> 2(6)
	<input type="checkbox"/> 2(7)

There are three sort methods that can be applied:

- The first two (**Alpha** and **Homeroom**) require no further set up will be applied as soon as you push the button
- The **Term/Period Teacher** sort requires you to select the terms and periods below that you would like to use. In the example shown, all sheets will be sorted by Quarter 2 Period 1 teachers. When you select this sort method, the Term, Period, and Teacher will be printed on the top right corner of each sheet.

## 9. Running/Printing PDFs of Program Planning Sheets

Once you have your students filtered and sorted, you are ready to create your PDF file. There are three buttons for creating PDF files.

One File
 Blank

Individual Files

- **One File:** This will create a single, multi-page PDF file for printing. You will be given the choice of including all of the students in the current filter or just the one student currently visible on screen. You will then be asked to save the file. If you select “Automatically open file” at the bottom of the save box, your PDF will be opened for you as soon as it is ready.
- **Blank:** This will produce a generic version of the selected template that a student can fill in. On this generic version of the template, the courses list will be replaced by a “Note to Counsellor” box.
- **Individual Files:** This will save each student’s form as a separate PDF file so that they can be easily emailed if you choose to do so. You will be asked for a folder to save the PDF files to.