

Course Planner

Last Modified on 03/31/2025 2:53 pm CDT

Tool Search: Course Planner

Submit feedback for the new Course Planner by clicking the **Feedback** button in the bottom right hand corner. This takes you to the Campus Community Course Planner forum topic where you can add your suggestions for the Course Planner.

The Course Planner displays request tallies, computes number of sections needed, and compares students requests and sections to last year's calendar to see how these changes may affect section staffing needs. Any scheduling related course item can be modified in the Course Planner, including course constraints, room placement and teacher assignment.

The Course Planner can be used throughout the scheduling process, but is best used after calendars for the next school year are created and enrollments have been rolled forward and student requests are entered.

Course Planner රු	Scheduling & Courses > Scheduling > Course Plan									
Fitter 🗸			More Scheduling Tools Staff Planner Scheduling Board							
0742 Writing Center Tutor English			PLACEMENT RESTRICTIONS							
Requests Sections		Courses	Constraints							
Current Needed To Build Placed 0↓ 0↓ 0 14	Remaining Seats 70	Section Template Group Priority M NEw Template Group Stud								
1700 English 9 I English			PLACEMENT RESTRICTIONS							
Requests Sections		Courses	Constraints							
Current Needed To Build Placed 0↓ 0↓ 15	Remaining Seats 375	Terms SchedulesPeriods Priority M	nts ₃ ₃ ₃							
1701 English 9 II English			PLACEMENT RESTRICTIONS							
Requests Sections		Courses	Constraints							
Current Needed To Build Placed 0↓ 0↓ 15	Remaining Seats 375	Terms Schedules Periods Priority M M Stud 2	nts ₃ 3 3							
1702 English 10 English			PLACEMENT RESTRICTIONS							
Requests Sections		Courses	Constraints							
Current Needed To Build Placed 4↓ 0↓ 14	Remaining Seats -4	Terms Schedules Periods Priority M								
1703 English 10 English			PLACEMENT RESTRICTIONS							
Requests Sections		Courses	Constraints							
Batch Edit Course Batch Edit Constraints Print]		Feedback 🗭							
	Cours	e Planner								

See the Course Planner Tool Rights article for information about rights needed to use this tool.

When to use the Course Planner

- AFTER calendars for the next school year are created.
- AFTER enrollments have been rolled forward.



- AFTER student requests for the next year are entered.
- BEFORE and DURING the building and loading of courses when using the Scheduling Board

Navigation of Course Planner

A **Year, School** and **Calendar** (and **Structure** when applicable) MUST be selected in the Campus toolbar in order to display information.

Locked Trial

When viewing the Course Planner for a Scheduling Trial that is currently locked (e.g., someone is working on that trial in the Scheduling Board), a banner displays at the top of the Course Planner indicating such. This banner displays only when navigating to the Course Planner from the outline (not using the quick access from the Scheduling Board.)

Changes made in Course Planner in a locked trial cannot be saved.

Scheduling Boa	ard ☆				
Filter by Trial Nam	Name	dministrator on 05/24/2023 2:49 PM	l		
	Course Planner ☆				
	The active trial for this Calendar	r/Schedule is currently open in the Scheduling Bo	oard by System Administrator, opened at 05/24/20	23 2:49 PM. Editing is not allowed until the trial is clos	sed to prevent data loss.
	Filter ¥				
	0003 Skills Seminar A	A I (Academic) Special Education			
	Requests		Sections	Course	s
		Locké	ed Trial Indicator		

Filter Options

Use the **Filter by Course Number or Name**, **Filter by Department** and **Filter by Ad hoc** options to assign staff and rooms to a course or for an entire department. Begin typing in the field by entering a Course Number or Course Name, or the start of a course number or name, the start of a department name, etc. Matching results display and are further refined as more characters are entered. A message displays when no matching results are found.

Course Planner රු									
Filter A									
Filter by Course Number or Name		Filter by Department		Fi	ilter by Ad Hoc				
170	×	English 🕴		×	sme CP included	× •			
1700 English 9 I	\sim								
1701 English 9 II									
1702 English 10 I				Sections					Co
1703 English 10 II		Needed 0	To Build 1	Placed 14	Remaining Seats 70			Terms 2	Schedules 1
1704 Acting									
1705 Creative Writing	~								
Requests			5	Sections					Co
Current 0↓		Needed 0↓	To Build 11	Placed 15	Remaining Seats 525			Terms 2	Schedules 1
1701 English 9 II English									
			_	_		_	_	-	_
		Cou	rse Plai	nner Fi	ilter Options				

Click the Filter toggle arrow up or down to show or hide the filter options.

• Filter by Course Number or Name. When a course is selected here, only that course's information displays. This is helpful when a course has specific constraints for the teacher or for the room. For courses

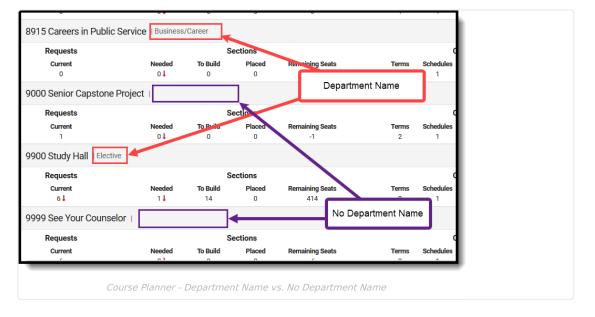


like Physical Education or Cooking, where those courses meet are very specific - GYM or FOOD LAB. These courses often have a few teachers that can teach them, who may also have limited scheduled due to coaching responsibilities, for example.

- **Filter by Department**. Multiple departments can be selected at one time. Only those courses assigned to those departments are listed. This allows planning for ALL English courses or ALL Science courses, for example. Departments must be created and Departments must be assigned to the Course.
- Filter by Ad hoc. Filters created in Filter Designer using the Data Type of Course/Section are available for selection. Any course included in the selected filter that is active in the selected school and calendar display.

Selected Filter By options remain when navigating to other tools for the next time the Course Planner is accessed.

Since the Department assignment is optional, courses that are not assigned to a department are listed in course number order (like other courses) without a department name.



More Scheduling Tools

Access the **Staff Planner** and the **Scheduling Board** from the Course Planner by clicking either of the options in the upper right corner.

This ONLY displays when navigating to the Course Planner from the Scheduling Board. When opening Course Planner from the index, More Scheduling Tools DO NOT display.

Course Planne	er ☆				S	Scheduling	& Courses	> Schedul	ing > Cou	rse Planner	
Filter 🗸							_	re Scheduling taff Planner	Tools Schedulin	g Board	
0742 Writing	Center Tut	or English						PL	ACEMENT RE	STRICTIONS	
Requests	Requests Sections				Courses			С	Constraints		
Current 0↓	Needed 0↓	To Build 0	Placed 14	Remaining Seats 70	Section Template Group NEw Template Group		Max Students 5	Teachers 3	Rooms 3	Rules 0	
_		Acc	cess to S	Staff Plann	er and Scheduli	ing Bo	ard				



Action Bar Options

Across the bottom of the Course Planner is the Action Bar. Available functions are:

- The option to add or replace basic course information for multiple courses.
- Add, replace or remove course constraints for multiple courses.
- Print the course information.
- View the Course Planner in full screen mode.

The **Batch Edit Course** option adds or replaces the values for the course information that displays on the main view of the Course Planner.

It is recommended that Filter options be added prior to using this option.



The **Batch Edit Constraints** option allows the updating of teachers, rooms and placement restrictions for multiple courses at one time.

After filtering the list of courses to an entire department or a course name, for example, set constraints to have a particular teacher or cohort of teachers added as the primary teacher, or set the room for all Performing Arts classes to meet in the Auditorium, or to not have Physical Education courses meet during first period.

It is recommended that Filter options be added prior to using this option.

The **Print** option generates a .csv export of the Course Planner grid. It lists the same information that is currently displayed, but in spreadsheet format.

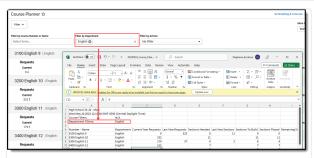
When the list of courses is filtered, only those courses that meet the filter options are included in the .csv export. In the example to the right, the Filter by Department field is set to English, so only courses assigned to the English department display in the tool AND in the spreadsheet. ections will delete easting data when using heplace.

ner ~ Batch Edit Course Constraints

Collapor Al

6 Add Reliev Remov Cared

Batch Edit Constraints



English Department Filter, Print



The Course Planner can be viewed in full screen. Click the **Full Screen** button to remove Campus toolbar and tool header, as well as the Campus outline.

Click the button again or use the ESC key to return to standard view.

Attach Attach <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>								
Variation P <	= 9. maga						anterspanne 🔺 ? 🖽 🔺	
	 * 3 	Course Planer 12					Scheduling & Courses + Scheduling + Course Planee	
$ \begin{array}{c c c c c c c c c c c c c c c c c c c $	Main Menu 🔛	And a	No. Y					Marchinesky Task Safetynese: Scientific Scient
Ale and a la second de la secon		ETIS Milling Center Tutor I super-	CND Writes Center Tuby (Code)			A infeiteareas	some is now full some an antimeters	(8.00000-00100000)
Among and an angle and angle and angle and angle and angle a							100 M	
$\begin{array}{c c c c c c c c c c c c c c c c c c c $			Carnel 11		Industry Parent	Resulting Sector	Senter Terplatulenge Printy Kan Statette Man Terplatulenge 5	Tasken Harm Ada 7
March			1700 English 91 House					(1.0000-0.0000)
Marchine 1 <								
			11			furnating laws	A A A 17	Tantan Asia P
A constraint of the second sec			1701 English/9 8 condim					(1.0000-001000)
The second secon								
			11	11		Tri Ini		
Alternative and a set of the set								(Automatical and the first
And The second s		(area)		No.		Designation from		
				14	14			
American and a second and a sec								(Lossereneed)
And the second s		Acres 1	Carmel	haded	NAM Field	Remarking Danks	Terms Scheduler Particle Neurila No. 15 donts	Tachen Rome Adve 1
I TARANTE I TARA					14		A A A 1	
Next Design 1 Next Control Con								
			frepreta		Deciura		Carren	Canadraphia
			7				Index B	
And S & Social Control And State Control And S		Ball M Sara Rest Streams Fire	1				Indat B	
					cree	n Dis	nlav	
Full Screen Display			1	un 0		1 213	prog	
Full Screen Display								
Full Screen Display								
Full Screen Display								

Course Planner Layout

The Course Planner lists all active courses in the selected school and calendar (inactive courses are not listed). Information that displays is based on the Course Information fields, student requests and entered constraints that affect the placement of courses. With this information, the Scheduling Board places the Course Sections in the best location for the most students.

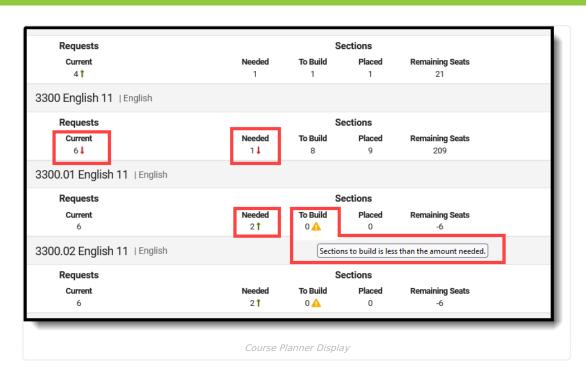
<u>^</u>							More Scheduling Tools Staff Planner Scheduling Board
Course Number or Name	Filter by Department			er by Ad Hoc No Filter		Ţ	
2 Writing Center Tutor Eng	ish						PLACEMENT RESTRICTION
Requests				Sections		Courses	Constraints
Current 0↓		Needed 0↓	To Build O	Placed 14	Remaining Seats 70	Section Template Group Priority Max Students NEw Template Group 5	Teachers Rooms Rules 3 3 0
0 English 9 English							PLACEMENT RESTRICTION
Requests				Sections		Courses	Constraints
Current 0 4		Needed 0	To Build	Placed 15	Remaining Seats 375	Terms Schedules Periods Priority Max Students	Teachers Rooms Rules 3 3 3

Main View

The main view of the course Planner lists the current number of Requests that have been made, basic Section information, basic Course information, and any constraints that are associated with that course.

A red down arrow, a green up arrow and a warning triangle may display with the Requests and Sections. Informational text displays for each of these.

- A **red** down arrow indicates the number of requests is lower than the number of Requests/Sections Needed in the last year.
- A green up arrow indicates the number of requests is higher than the number of Requests/Sections Needed in the last year.
- A yellow caution triangle indicates one of the following:
 - The number of Sections to Build is less than the amount needed;
 - The number of Terms is zero (0), the number of Periods is zero (0), the number of Schedules is zero (0);
 - The Sections to Build is greater than the Teacher's maximum sections to teach.



The **Section Template Group** and **Max Students** under **Courses** and the **To Build** value under **Sections** reports the information from the Course Information editor.

When no Section Template Group is assigned to the Course, the **Terms/Schedules/Periods/Max Students** values under **Courses** and the **To Build** value under **Sections** reports the information from the Course Information editor.

• Max Students must be populated with a field greater than zero.

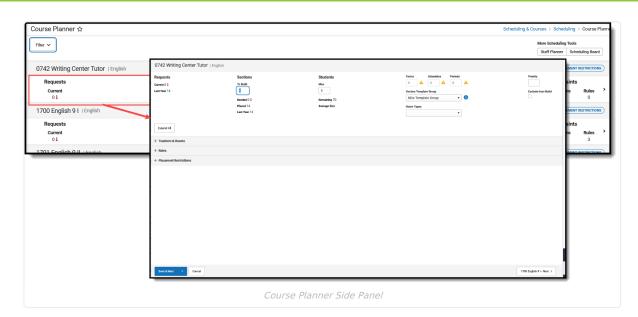
Infinite Campus

• **Priority** (e.g., Schedule Load Priority on the Course Information editor) is used to meet the requests of courses needed for graduation and/or Academic Plan requirements.

Course Planner &	Scheduling & Courses > Scheduling > Course Planet	Course Planner & scheduling & Cou	rses > Scheduling > Course
The A	Non Scheduling Tools		New Scheduling Tools
Ther to conscitute or time that to be arrest Ther to 4 free	Tial Planer Scheduling Road		Staff Planer Schotsling Box
Index Tarras . Index O X No The *		Play by Grann Marter ar Save Play by Grant Play by Arter Sector Save Play by Grant Save Play by Control Save Play	
0742 Wilking Center Tutor Lington	(1.124.00.000)		
Property Sections Courses General Named Tabled Paral Remarks Safe Sections Courses	Constraints Teachers Rooms Rales	0742 Writing Center Tutor I tradini	Constraints
84 01 0 16 70 Wenterplanding 5	3 3 8	Requests Courses Current Needed To Build Placed Pennining Basis Section Template Droop Priority Max Students Tem	bers Boards Bales
Preparets Course Information dr	Constraints	01 01 01 0 16 16 17 17 17 18 17 18 17 18 17 18 18 18 18 18 18 18 18 18 18 18 18 18	
Barrent Headed 07/22 Witching Control Tutar B2 02 00 000 00 0000 100 Prior to sectors	Saders from fiden *	Requests Sections Courses	Constraints
Control of the second sec		Current Needed Taihuid Piccel Remaining Sunts. Terms Mahadales Pariod Printly Max 23adents. Terms 04 04 1 25	Jurs Rooms Rules
Count Manual Long Count M		Course Information 🔅	
Control Information Control Control Informatio Control Information Control Inform		1700 English 91	
Nami		Same O Deates 67 Push To Sections	
Determine Parameter Determine Landow Parameter Vol. Determine Parameter		Product grading unique changes are study to be publied to unitizes.	
		D Convert Free Convert Based Links - 1985 Convert Based Links - 1985 Convert State	
DM. Singl. Bases Park Millowy Repark		Summer Summer Standard Active Stree Summer Linds Catalon Control Contro Contro Control Control Control Control Co	
tore ferrerie juicts		potention	
Rommon Mandalmi Machadam MakTandara Di Bandala Minatana Padam Bayadak Minatana Padam Abardan Makin Dalami Abarda Apalahana Amerika Pada		Take Com	
Index MMM ELLUMIN Series Extended for a		Steable Lad Phility Tabletin T	
Sind Commy		O'N Vingel Borow Forte Jetions Tomate	
Receiption Completion New Completion Completions		700	
162 fee Descript County		Name Paperson Albert	
		regionary Mark Index Allowander Poly Stockets Cn. Parenteet Markow Poly Stockets Cn. Department Markow Poly Stockets Cn.	
Course Planner, Course Information Fields with Sectio	n Template		
	1		
Group		Course Planner, Course Information Fields without Se	ction
		Template Group	

Course Planner Side Panel

Click anywhere on the Course row or click the chevron at the end of the row to display more information about the course. Modifications can be made in the side panel - assigning teachers, assigning rooms, etc.



Clicking the Course Number, Name, Department, or anywhere else in the gray header does nothing.

Collapse or Expand Course Planner Cards

amõus

Use the **Expand All** button to show the detail of the Teachers & Rooms card, the Rules card, and the Placement Restrictions card. The cards can be expanded one at a time by clicking the plus sign. Once either card is expanded, the Expand All button changes to **Collapse All**.

Course	Planne	r 🏠											
Filter 💊	1100 li	ntegrate	d Math I	Mathem	atics								
1100	Collapse	e All											
Re	+ Teache	ers & Rooms											
	+ Rules												
1200	— Placem	nent Restrict	ions										
Re	Click o		estrict course		t. Select an e eriod Schedule		column by c	licking the h	neader.				
1300													
Re		Odd	Q1 Even	All	Odd	Q2 Even	All	Odd	Q3 Even	All	Odd	Q4 Even	All
C	1	0								0	\otimes		\otimes
1400	2			0			0						
Re	3		-										
(4												
	5												
	-									_			

When saving information on the side panel, there are three options:

- Save & Next. Saves the modified data on the selected course and then moves to the next course in the list, based on any filtering of courses from the main view. The next course is also listed in the far right corner of the side panel. Save & Next is the default save option, unless the last course in the list is displayed, in which case Save & Next is not available.
- Save & Stay. Saves the modified data on the selected course and then remains on that course for further updates.
- Save & Close. Saves the modified data on the selected course and then closes the side panel, displaying the main Course Planner view.

To not save any changes made in the side panel, click **Cancel**.



Teachers & Rooms

The Teachers & Rooms card lists all active teachers in the selected calendar and displays a list of AVAILABLE rooms. The list of teachers and rooms can be narrowed to a smaller one by entering text in the Filter fields.

Teachers

Teachers who are already assigned to the course always display at the top of the list, whether or not they are part of any filtering that is done for teachers.

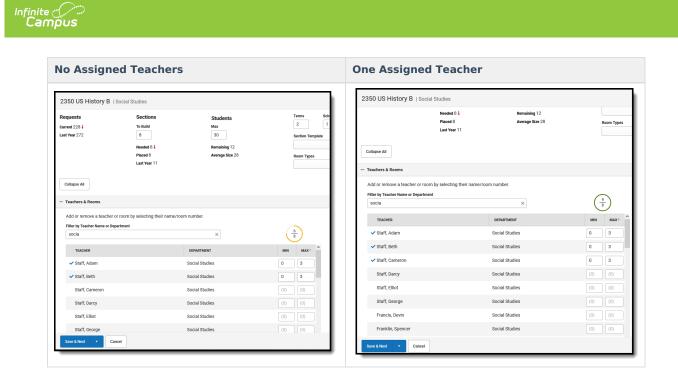
d or remove a teacher or room by selecting or by Teacher Name, Department or Team Sec	their name/room number.			Filter by Room or Room Type	
TEACHER	DEPARTMENT	TEAM	MIN MAX*	ROOM	PRIORITY ·
Staff, Adam	Special Education	D	(0) (0)	0110 (period1)	
Staff, Beth	Special Education		(0) (0)	Test (period1)	
Staff, Cameron	Special Education		(0) (0)	0111	
Staff, Darcy	Special Education		(0) (0)	0112	
Staff, Elliot	Special Education		(0) (0)	0113	
Staff, George	Special Education		(0) (0)	0114	
Staff, Heather	Special Education		(0) (0)	0115	
Staff, Isaac	Special Education		(0) (0)	0166	
	As	signing Teach	ners to a Course		

Filter the list of teachers by their Name (first name or last name) or Department name, or Team (Scheduling Group). The filter fields are dynamic, meaning any text entered into them instantly filters the options to list matching results.

The **Progress Dial** represents the maximum number of sections assigned to the teacher over the total number of sections to build and updates upon saving. The following images show different values of the Progress Dial.

For the US History class, eight sections are needed to meet the number of student requests. Each assigned teacher has a maximum section value of 3 (this is default value that can be changed if needed). That means at least three teachers are needed to have a complete (green) Progress Dial.

No Assigne	ed Teachers			One Assigned	Teacher		
2350 US History B	Social Studies			2350 US History B Social S	Studies		
Requests Current 228 ↓ Last Year 272	Sections To Build 8 Needed 8 1 Placed 8 Last Year 11	Students Max 30 Remaining 12 Average Size 28	Terms Sca 2 1 Section Template Room Types	Requests Current 228 1 Last Year 272	Sections To Build 8 Needed 8 1 Placed 8 Last Year 11	Students Max 30 Remaining 12 Average Size 28	Terms 2 Section Template Room Types
Collapse All — Teachers & Rooms				Collapse All			
Add or remove a teacher o Filter by Teacher Name or Dep socia	r room by selecting their name/room nu artment	umber.	0 8	Add or remove a teacher or room b Filter by Teacher Name or Department socia	by selecting their name/room numb	per.	3
TEACHER	D	EPARTMENT	MIN MAX*	TEACHER	DEPA	RTMENT	MIN MAX* ^
Staff, Adam	So	icial Studies	(0) (0)	✓ Staff, Adam	Socia	I Studies	0 3
Staff, Beth	So	icial Studies	(0)	Staff, Beth	Socia	I Studies	
Staff, Cameron	So	icial Studies	(0) (0)	Staff, Cameron	Socia	I Studies	
Staff, Darcy	So	cial Studies	(0) (0)	Staff, Darcy	Socia	I Studies	(0) (0)
Staff, Elliot	So	cial Studies	(0) (0)	Staff, Elliot	Socia	I Studies	
Staff, George	So	cial Studies	(0) (0)	er // e		Los E	
Save & Next • Can	ncel						
Two Assign	ned Teachers			Three Assigne	ed Teachers		



Rooms

Rooms that are already assigned to the course always display at the top of the list, whether or not they are part of any filtering that is done for teachers.

Filter the list of rooms by Room (name or number) or Room Type (lab, gym, etc.). The filter fields are dynamic, meaning any text entered into them instantly filters the options to list matching results.

- Teachers & Rooms					
Add or remove a teacher or room by select	ing their name/room number.				
Filter by Teacher Name, Department or Team Spec	×		0	Filter by Room or Room Type	
TEACHER	DEPARTMENT	TEAM	MIN MAX*	ROOM	PRORITY*
🗸 Staff, Adam	Special Education	D	0 3	✓ 0110 (period1)	1
Staff, Beth	Special Education		(0) (0)	Test (period1)	
Staff, Cameron	Special Education		(0) (0)	0111	
Staff, Darcy	Special Education		(0) (0)	0112	
Staff, Elliot	Special Education		(0) (0)	0113	
Staff, George	Special Education		(0) (0)	0114	
Staff, Heather	Special Education		(0) (0)	0115	
Staff, Isaac	Special Education		(0) (0)	0166	

When creating rooms, a Name is required entry, but a Room Type can also be added. Room Types are created in the Attribute/Dictionary and are more descriptive than just a room number or name. It could be LAB or GYM or POOL, for example. When a school has multiple labs or multiple gyms, the Room Type would be LAB and the Room Number might be LAB A.

Room Priority is used to place a section into the room with a Priority of 1. This is automatically entered when the FIRST room number is selected. When more than one room is selected for a particular course, or there are several rooms in which the teacher can teach that course, select all appropriate rooms and add a priority. Priority is also automatically assigned; a value of 1 indicates that is the preferred room and was selected first.

Rules

Course rules can be assigned to courses to assist with the planning and placement of courses across multiple years. When a rule is assigned to a course, its complementary rule is applied to the course's pair. For example, when Algebra I has a rule that is must be taken BEFORE Geometry, a rule is added to Geometry that it must be taken AFTER Algebra I.

To aid with Academic Planning, there are different types of rules that can be added to courses - Scheduling



Rules and Planning Rules:

- Scheduling Rules tie different courses together in a variety of ways which affect the flexibility of the Scheduling Board. The rule only takes affect when a student requests both courses during the same scheduling year.
- **Planning Rules** define relationships between courses across years. Planning rules are NOT used in the Scheduling process.

In the Course Planner, only Scheduling Rules can be added to courses. To add Planning Rules to a course, use the Course Rules tool.

Use rules only when absolutely necessary to achieve the education goals of the district.

270) World Geography	Social Studies						
Requ Current Last Ye	14	Sections To Build Needed 0 ↓ Placed 14 Last Year 14	Students Max Remaining -1 Average Size		Terms Schedules Section Template Group Room Types	Periods v		ority
+ Tea	apse All chers & Rooms							
— Rul	25							
	RULE TYPE			COURSE				DELETE
	Before		•	2701 World Geogr	raphy		•	Delete
	Same Teacher		×	2701 World Geogr	raphy		•	Delete
<								>
+ Pla	cement Restrictions							
			Course	Planner	Rules			

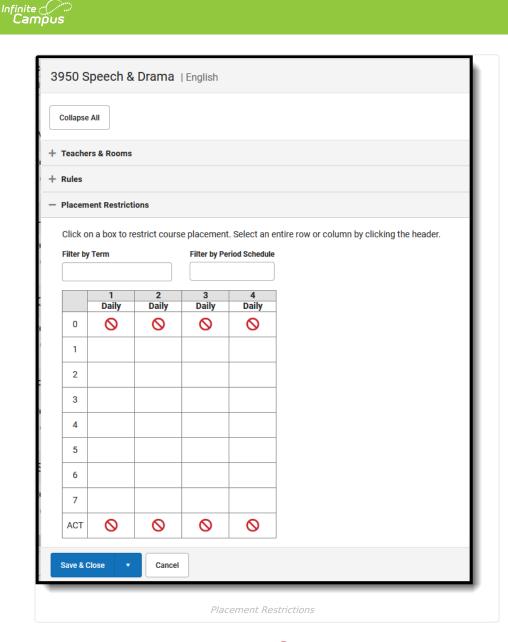
See the Scheduling Rule Descriptions and Examples for detailed explanation of the available rules.

A course cannot have a rule tied to itself. Meaning, the Course field does not include an option to select the course that is being viewed.

Placement Restrictions

The Placement Restrictions section creates a constraint on that period and term. This restriction can be for a selected period, a term or a schedule, or a combination of each. The restriction indicates a section is not placed in that period, schedule, or term.

Use the **Filter by Term** field to change the schedule grid to only display the entered Term number. Use the **Filter by Period Schedule** to only display that particular period schedule. Or, use them together to only display Term 3 and the Daily Period Schedule. These filter selections remain when moving to the next course.

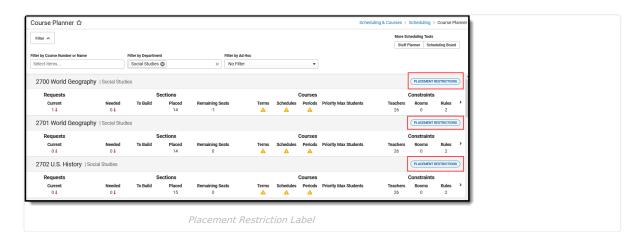


When a restriction is added, the No Symbol (\odot) is added to the period. Restrictions can be added for a period across all terms by clicking the period number row; to a period schedule by clicking that schedule name; for an entire term by clicking the term number; for a single period.

Restrictions are added for any period schedule or term that is not displayed due to filtering by term or schedule. When saved, a validation message displays to alert the user that changes were made to hidden terms/period schedules.

A label displays on the main Course Planner view when a placement restriction exists.





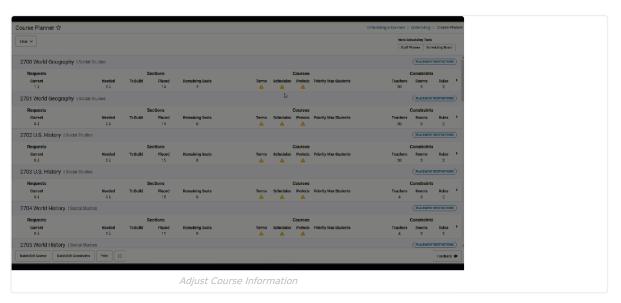
Modify Course Planner Information

Change Sections, Students, etc.

All of the information displayed in the Main Course Planner view can be modified in the side panel, EXCEPT the number of students who have requested the course.

- 1. Open the side panel by clicking in the row or clicking the chevron on the far right side of the row for the appropriate course.
- 2. Enter the appropriate values for the selected course for the following fields by typing in the field or selecting an option from the dropdown list:
 - Sections (To Build)
 - Students (Max)
 - Terms
 - Schedules
 - Periods
 - Section Template
 - Room Types
 - Priority
- 3. Mark the **Exclude from Build** checkbox to have the build logic in the Schedule Board ignore this course.
- 4. If this is the only update that needs to be made, click **Save & Next, Save & Stay** or **Save & Close** button. Otherwise, continue making adjustments for this course.

When returning to the main view, the changes are reflected in the Sections and Courses tallies.

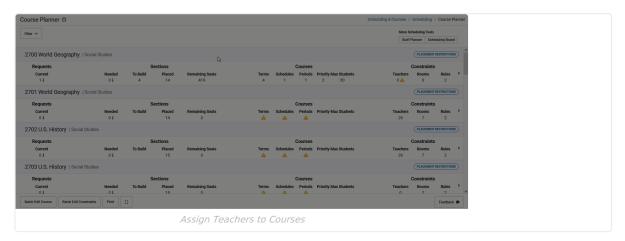




Assign Teachers to Courses

- 1. Expand the Teacher & Rooms card.
- 2. Filter the Teachers and Rooms, if desired.
- 3. Click anywhere in the row for the teacher to be assigned to the course. A blue checkmark displays next to a teacher when it has been assigned, and a green alert message displays in the upper right corner. To remove teachers from a course, click the blue checkmark next to their name.
- 4. If needed, modify the **Max** value. This is the maximum number of sections of the course the staff person can teach.
- If this is the only update that needs to be made, click Save & Next, Save & Stay or Save & Close.
 Otherwise, continue making adjustments for this course.

When returning to the main view, the number of teachers is updated to reflect the number of teachers added to the course.



Assign Rooms to Courses

- 1. Filter the list of rooms to those appropriate for the selected course.
- 2. Select the desired rooms for the teacher's courses by clicking in that room row. A blue checkmark displays next to selected rooms. To remove rooms from a course, click the blue checkmark next to its name.
- 3. If this is the only update that needs to be made, click **Save & Next, Save & Stay** or **Save & Close**. Otherwise, continue making adjustments for this course.

When returning to the main view, the number of rooms is updated to reflect the number of rooms added to the course.

Course	Planner ☆					Scheduling & Course	s > Scheduling > Course Planner
Filter 🗸	2700 World Geography Social S	Studies					
2700 Rev C	Requests Current 1 J Last Year 450	Sections To Build 4 Needed 0 1 Placed 14	Students Max 30 Remaining 419 Average Size	4 1 Section Template Gr Room Types	Periods 1		Priority 2 Exclude from Build
2701 Rei C	Expand All	Last Year 14		0110	•		
2702 Rev C	+ Teachers & Rooms + Rules + Placement Restrictions						
2703 Rev C							
Batch Ed	Save & Next • Cancel						2701 World Geography - Next >
		Ass	ign Rooms to Course	25			

Assign Rules to Courses

- 1. Click Add Rule. A blank Rule Type field and Course field display.
- 2. Select the Rule Type from the dropdown. To remove a rule, click Delete.



- 3. Locate the correct **Course** to which to assign the rule.
- 4. If this is the only update that needs to be made, click **Save & Next, Save & Stay** or **Save & Close**. Otherwise, continue making adjustments for this course.

When returning to the main view, the number of rules assigned to the course updates to reflect the number of rules added.

Both the Rule Type and the Course fields must be populated in order to save the record.

Course	Planner 🏠					Schedul	ling & Courses > Scheduling >	Course Planner				
Filter 🗸	2700 World Geography Socia	al Studies										
2700	Requests	Sections To Build	Students Max	Terms	Schedules	Periods	Priority 2					
Re	Last Year 450	4	30	Section Temp	late Group	• 0		from Build				
c		Needed 0 ↓ Placed 14	Remaining 419 Average Size	Room Types								
2701		Last Year 14		0110		•						
Rei	Expand All											
2702	+ Teachers & Rooms											
Re	+ Rules + Placement Restrictions											
2703 Re												
c												
Batch Ed	Save & Next * Cancel						2701 World Geograp	hy - Next 🗲				
			Add Rules									

Add Placement Restrictions

Click to add a placement restriction in the desired term(s) and periods). To remove a restriction, click in that space again.

When this is the only update that needs to be made, click **Save & Next, Save & Stay** or **Save & Close**. Otherwise, continue making adjustments for this course.

When returning to the main view, the Placement Restriction label displays. Details of that restriction are not displayed.

Collapse		Drama				
- Teache	rs & Rooms					
- Rules						
- Placem	ent Restricti	ons				
Filter by	Term	I	Filter by Pe	riod Schedule		
	1 Daily	2 Daily	3 Daily	4 Daily		
0	Dully	Duny	Duny	Duny		
1						
2						
3						
4						
4						
4						
4 5 6						

Previous and Next Course

Infinite (Camous

When finished modifying the course with teachers, rooms and placement restrictions, use the **Previous** and **Next** buttons in the bottom right to add teachers, rooms and placement restrictions to other courses without leaving the Side Panel view. Changes do need to be saved before viewing another course.

2							
3							
4							
5							
6							
7							
ACT	0	0	0	0			
Save & N	lext 🔹	Cancel]			< Prev - 3700 American & British Literature	3750 Gothic Literature - Next >
					Previous and Next Cour	ses	

Modify Course Planner Information Using Batch Functionality

Prior to using either of the Batch Edit options, filter the list of courses in the selected calendar to a limited number



using one or all of the available Filter options - by Course Number or Name, by Department or by Ad hoc. Then, the batch process affects a limited number of records.

Course Planner 🏠	Scheduling & Course > Scheduling > Course Planner
Filter > Filter by Department Filter by Ad Hoc Select Items Music >> No Filter 7A00 Erschman Obair 1 Music Batch Edit Constraints Print	Batch Edit Course Information 43 filtered records will be affected, including a field with no Fill Value will delte existing data when using Replace. Sections to Build Include Fill Value Add Replace Cancel
Batch Edit Course - Filtered	

These two Batch Edit options replace the following tools:

- Request and Rosters
- Related Course Planner tools in Scheduling Board
- Mass Set Section Template Groups Wizard

Batch Edit Course

The same values that can be modified on the Course Planner Side Panel for one course can also be modified for multiple courses using the Batch Edit Course option.

Course Planner \$				Scheduling & Courses > Scheduling > Course Planner
7400 Freshmen Choir I	usic			
7400 F Requests	Sections	Students	Terms Schedules Periods	Priority
Ormer 0.1	To Build	Max	2 1 1	
Req: Last Year 81	2	75	Section Template Group	Exclude from Build
0	Readed 0	Remaining 150	• 0	
	Placed 2	Average Size	Room Types	
	Last Year 2		-	
Collapse All		Batch Edit Course Information		- 1
		1 filtered records will be affected. Select a Text Fill Value or a Drop		
		Down Fill Value for any fields included in this batch change. Including		
		a field without either Fill Value populated will delete existing data		
		when using Replace.		
		Sections to Build Include Text Fill Value Drop Down Fill Value		
		0 or		
		Max Students		
		Include Text Fill Value		
		Terms		
		Include Text Fill Value		
		•		
		Schedules Include Text Fill Value		
		Periods		
		Include Text Fill Value		
		Section Template Group		
		Include Drop Down Fill Value		
		·		
		Room Type Include Drop Down Fill Value		
		Priority Include Text fill Value		
		Exclude from Build		
		Include Fill Value		
		Add Replace Cancel		
		Available Course Informa	tion Fields	
		Available Course Informa	LIUITTIEIUS	

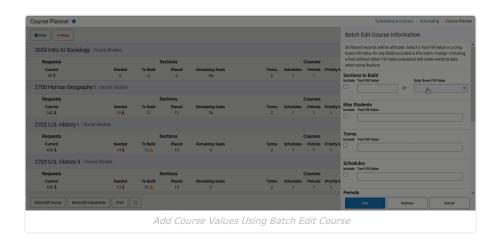
When adding values to the fields in the side panel, make sure the **Include** checkbox is marked. This selection ensures the item is updated with the entered value. Also note that when Include is marked but the Fill Value is not populated, existing information is replaced with no value (e.g., the value is deleted).

Add Course Information



Adding course information ADDS the entered values to those courses that do not already have values. For example, the Social Studies courses need the same amount of sections as were built for last year, allow up to 25 students, and meet in all four terms. Batch Edit Course can be used to ADD those values and update all Social Studies courses simultaneously.

- 1. Click Batch Edit Course in the Action Row. The Batch Edit Course Information side panel displays.
- 2. Enter the desired value for each listed field. Not every field needs a value.
- 3. Mark the **Include** checkbox to apply the entered value to the field.
- 4. Click the **Add** button.



Replace Course Information

Replacing course information UPDATES the entered values to those courses where values already exist. For example, the Social Studies courses currently have a Sections to Build value that matches last year's section, which needs to be updated to the Sections Needed value, and the Max Student value needs to be updated to 30. Using Batch Edit Course to REPLACE those values for all Social Studies courses updates those items simultaneously.

When a course has existing data, using Replace OVERWRITES that data and replaces it with the newly entered values.

When replacing values to the fields in the side panel, make sure the **Include** checkbox is marked. This selection ensures the item is updated with the entered value. Also note that when Include is marked but the Fill Value is not populated, existing information is replaced with no value (e.g., the value is deleted).

- 1. Click Batch Edit Course in the Action Row. The Batch Edit Course Information side panel displays.
- 2. Enter the desired value for each listed field. Not every field needs a value.
- 3. Mark the **Include** checkbox to apply the entered value to the field.
- 4. Click the **Replace** button.



Course Planner ★									Scheduling & Courses > Scheduling > Course Planner
Filter × Reset									Batch Edit Course Information
2653 Intro to Sociology Social	Studies								26 filtered records will be affected. Select a Text Fill Value or a Drop Down Fill Value for any fields included in this batch change. Including
Requests			ctions				Courses		a field without either Fill Value populated will delete existing data when using Replace.
Current 46 †	Needed 2 🕇	To Build 0 🔺	Placed 0	Remaining Seats -46	Terms 2	Schedules	Periods 1	Priority N	Sections to Build Include Text Fill Value Drop Down Fill Value
2700 Human Geography I Soc	al Studies								or •
Requests		Se	ctions				Courses		
Current 342↓	Needed 10 4	To Build 12	Placed 12	Remaining Seats 78	Terms 2	Schedules 1	Periods 1	Priority M	Max Students Include Text Fill Value
2702 U.S. History I Social Studie	BS								
Requests		Se	ctions				Courses		Terms Include Text Fill Value
Current 460 \$	Needed	To Build 12 🔺	Placed 13	Remaining Seats -5	Terms 2	Schedules 1	Periods 1	Priority N	
2703 U.S. History II Social Stud	les							Schedules	
Requests		Se	ctions				Courses		Include Text Fill Value
Current 452 ↓	Needed	To Build 12 🔺	Placed 13	Remaining Seats 3	Terms 2	Schedules 1	Periods 1	Priority N	
									Periods
Batch Edit Course Batch Edit Constraints	Print								Add Replace Cancel
		Re	place	Course Val	lues - Bat	ch Ed	dit C	ours	es

Batch Edit Constraints

Batch Edit Constraints modifies the Teacher and Room Constraints and Placement Restrictions for the filtered courses by **adding** constraints where values did not previously exist (blank values); by **replacing** existing values with new values; or by **removing** existing values.

Use the Collapse All/Expand All button to view the Teacher, Room and Placement Restriction cards at one time.

Add Constraints

Adding constraints updates a teacher assignment, room assignment or placement restriction updates the filtered courses to contain a value where a teacher, room or placement was not previously assigned or adds an additional teacher, room or placement.

In the example below, the filtered list of courses currently has no teachers, rooms or placement restrictions assigned.

Filter A									Scheduling & Course	s > Schedu	ling > C	ourse Plann
1										e Scheduling aff Planner		ng Board
Filter by Course Number or Name	ilter by Departm	nent		Filter by Ad Hoc								
Select items	Social Studie	es 🕲		× No Filter	•							
2703 U.S. History Social Studies												
Requests		Se	ctions				Courses			Constr	aints	
	Needed 0 I	To Build	Placed 15	Remaining Seats 0	Terms	Schedules	Periods	Priority Max Students	Teach 0	rs Roor 0	18	Rules >
2704 World History Social Studies												
Requests		Se	ctions				Courses			Constr	aints	
	Needed 0 I	To Build	Placed 11	Remaining Seats 0	Terms	Schedules	Periods	Priority Max Students	Teach 0	rs Roor 0	15	Rules >
2705 World History Social Studies												
Requests		Se	ctions				Courses			Constr	aints	
	Needed	To Build	Placed	Remaining Seats	Terms	Schedules		Priority Max Students	Teach		18	Rules 🔸
14	04		12	-4	▲	A	A		0	0		2

To add teacher, room and placement restrictions:

- 1. Click Batch Edit Constraints.
- 2. In the **Batch Edit Course Constraint**s side panel:
 - Click next to the desired teacher's name to add them to the courses.
 - $\circ~$ Click next to the desired room numbers to add those rooms to the courses.
 - Click in any period row, term row, or period schedule row to add a placement restriction for the courses.
- 3. Click Add. The courses are now assigned teachers, rooms and placement restrictions.

Repeat the same steps to add any missed teachers, rooms or placements.

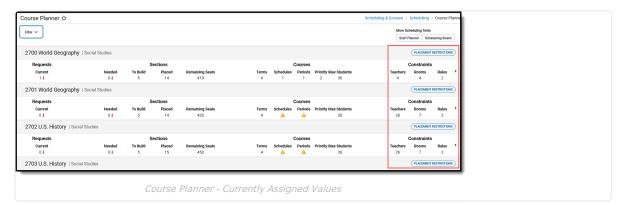


2703 U.S. History Social Studies											PLACEMENT	RESTRICTION	8)
Requests	Needed	Si To Build	ections Placed	Remaining Seats	Terms	Schedules	Courses Periods F	riority Max Students	Tea	chers	Constraints Rooms	Rules	,
04	04		15	0	A	A	A			4	3	2	
2704 World History Social Studies											PLACEMENT	RESTRICTION	8
Requests			ections				Courses				Constraints		
Current 0 I	Needed 0 I	To Build	Placed 11	Remaining Seats 0	Terms	Schedules	Periods F	riority Max Students		chers 4	Rooms 3	Rules 2	`
2705 World History Social Studies											PLACEMENT	RESTRICTION	8
Requests		-	ections				Courses				Constraints		
Current 1 ↓	Needed 0 I	To Build	Placed 12	Remaining Seats -1	Terms	Schedules	Periods F	riority Max Students		chers 4	Rooms 3	Rules 2	,
2706 U.S. Government Social Stu	dies										PLACEMENT	RESTRICTION	8
Requests		-	ections				Courses				Constraints		
Current 2 ↓	Needed 0 ↓	To Build 0	Placed 10	Remaining Seats 358	Terms	Schedules 0 🛕	Periods F	riority Max Students	Tea	chers 4	Rooms 3	Rules 0	`
											_	_	

Replace Constraints

Replacing constraints updates previous selections of teachers, rooms and placements to different teachers, rooms and placements.

Instead of the four teachers and three rooms that are currently assigned to these courses, there needs to be three different teachers and three different rooms assigned.



To update current placements:

- 1. Click Batch Edit Constraints.
- 2. In the **Batch Edit Course Constraint**s side panel:
 - Click next to the desired teacher's name to add them to the courses.
 - Click next to the desired room numbers to add those rooms to the courses.
 - Click in any period row, term row, or period schedule row to add a placement restriction for the courses.
- 3. Click Replace. The courses are now assigned teachers, rooms and placement restrictions.

Course	Planner 🏠	
Filter 🗸	Batch Edit Course Constraints	
2700 Rea	22 filtered records will be affected. Including a Constru- Collapse All	raint section with no selections will delete e
С	- Teacher Constraints	
2701	☑ Include	
Re	Add or remove a staff person by selecting their name	
2702	Filter by Teacher Name, Department or Team staff	×
Re	TEACHER	DEPARTMENT
С	✓ Staff, Brent N	A School
2703	✓ Staff, David	A School
Re	✓ Staff, John	A School
С	Staff, Shaina M	A School
Batch Ed	Add Replace Remove Cancel	
_	Batch Edit Constraints - Rep	place Option

Remove Constraints

Infinite (Camous

Removing teacher, room or placement restrictions values selected in the side panel from the filtered courses (i.e., the user selected the exact values that ought to be removed from existing records).

For the list of filtered courses, each course is assigned four teachers and three rooms and cannot be placed during Period 00. That information is visible on the main view of the Course Planner.

Course Planner ☆					Schedu		Scheduling heduling Tools Planser Sche	
0742 Writing Center Tutor English								RESTRICTIONS
Requests Current 01	Needed 0 4	S To Build 0	ections Placed 14	Remaining Seats 70	Courses Section Template droup Priority Max Students NEw Template Group 5	Teachers 3	Constraints Rooms 3	Rules >
1700 English 9 I English							PLACEMENT	RESTRICTIONS
Requests Current 01	Needed 0 4	S To Build 1	ections Placed 15	Remaining Seats 375	Courses Terms Schedules Periods Priority Max Students 4 1 1 25	Teachers 1	Constraints Rooms 3	Rules >
1701 English 9 II English							PLACEMENT	RESTRICTIONS
Requests Ourrent 01	Needed 0 4	S To Build	ections Placed 15	Remaining Seats 375	Courses Terms Schedules Periods Princity Max Students	Teachers 1	Constraints Rooms 3	Rules >
			C	ourse Pla	nner - Existing Values			

To remove those assignments and placement restrictions:

- 1. Click Batch Edit Constraints.
- 2. In the Batch Edit Course Constraints side panel:
 - Select the same teachers that are currently assigned to the courses.
 - $\circ\;$ Select the same rooms that are currently assigned to the courses.
 - $\circ~$ Click to add the No Symbol from Period 00.
- 3. Click Remove. All previously assigned constraints are now removed and set back to zero (0).



Next Steps

- Review the Scheduling Center and/or Checklist for Scheduling for remaining scheduling tasks.
- Use the Scheduling Board to build the courses and load the student requests.
- Generate scheduling reports to review the placement of courses.
- When all scheduling items have been completed, mark the Scheduling Board Trial active.

Previous Versions

Course Planner [.2323] Course Planner [.2315 - .2319]