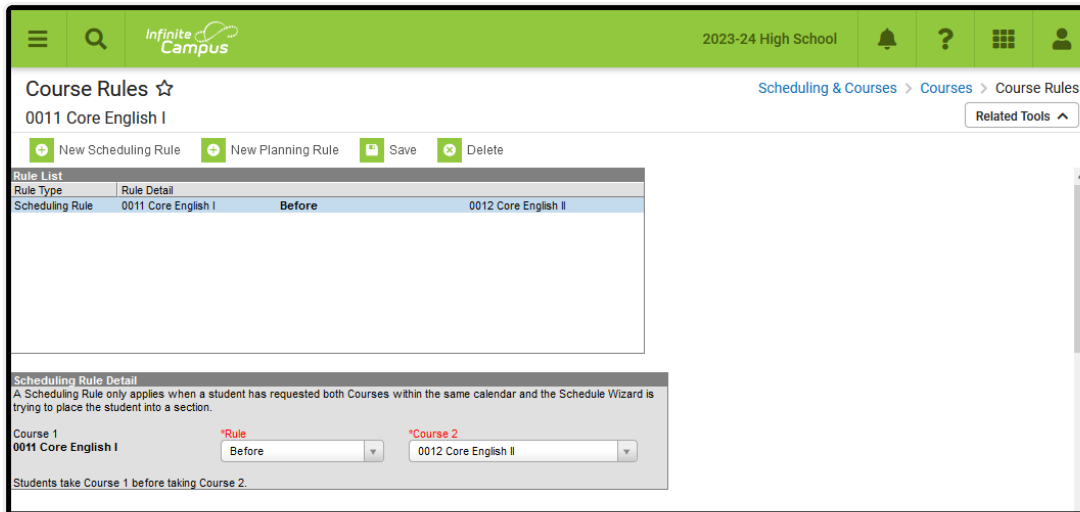# Course Rules

Last Modified on 03/31/2025 3:24 pm CDT

Tool Search: Course Rules

Course rules are added to courses to assist with the scheduling of courses and the planning of courses across multiple years. When a rule is applied to a course, its complement is applied to the course's pair. Rules should only be used when absolutely necessary to achieve the education goals of the district.

Course Rules

See the Course Rules Tool Rights article for information about rights needed to use this tool.
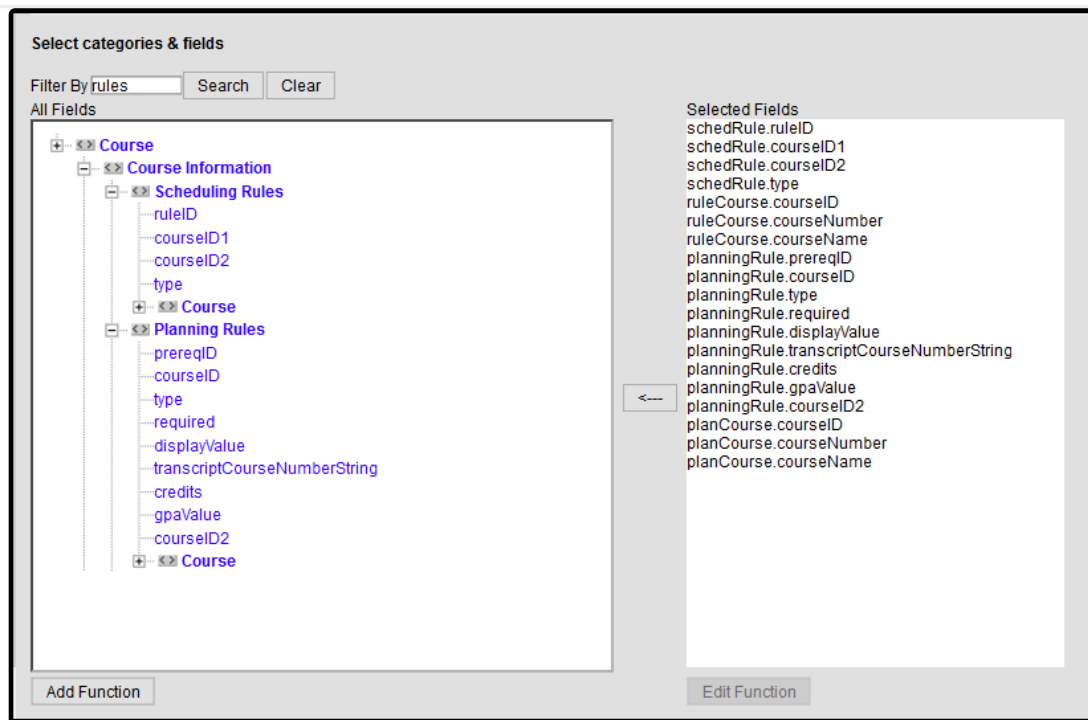
Course Rules in Ad hoc Query Wizard

Scheduling Rules and Planning Rules assignments are available in the Query Wizard for **Course/Section** Data Type filters. Fields can be selected from the following folders:

- Course Information > Scheduling Rules
- Course Information > Planning Rules

Identifying course information also needs to be included in the filter. Choose these fields from the Course > Course Information section (courseInfo.courseNumber, courseInfo.courseName, for example). For clarity, also select identifying course information from the Scheduling Rules > Course section (courseInfo.courseNumber, courseInfo.courseName, for example).

Ad hoc field names are included in the tables below for each rule.

Course Rules Available in Ad hoc Reporting

Scheduling Rules

The Scheduling Board approaches the fulfillment of student course requests in a very systematic manner. In most situations, the Board needs to understand the relationship between courses as they are created and defined. This is done using the scheduling rules.

Scheduling rules tie courses together in a variety of ways, affecting the flexibility of the Scheduling Board. The rule only takes effect when a student has requested both courses during the same scheduling year. When a rule is applied to a course, its complement is applied to the course's pair. Rules should only be used when absolutely necessary to achieve the education goals of the district.

Scheduling Rules are NOT used in the planning process.

Scheduling Rules

Scheduling problems arise when scheduling rules are applied incorrectly or overused. When student requests are not being fulfilled for a course or series of courses, analyze the scheduling rules associated with those courses to make sure they are not preventing the Scheduling Board from working efficiently. Scheduling rules may not operate as expected when a section spans multiple terms.

Scheduling Rule Detail Editor

Field	Description	Ad hoc Field Name
Course 1 *Required*	The course that is currently selected.	schedRule.courseID1
Rule *Required*	Selection indicates the scheduling rule that is assigned to the course. See the descriptions and examples below for more information.	schedRule.type schedRule.ruleID
Course 2 *Required*	The course that is either the Parent course or the Child course, depending on which rule is being assigned. The inverse of the selection displays on the Course Rules detail of the selected course.	schedRule.courseID2

Scheduling Rule Descriptions and Examples

Following are the names and definitions of the Scheduling Rules. Make sure that the rules are necessary before assigning them to courses.

Some rules become irrelevant when using a semester term setup. Precedes/follows and after/before do not have any basis when the calendar only has two terms. However, when the calendar was built

with four terms (quarter schedule), these rules would become very useful.

The Build and Load columns indicate whether the rule impacts the Building of the schedule or the loading of the students into the course.

Rule	Description	Comments	Build	Load
Before	Students take Course 1 before Course 2. This rule limits the terms into which a student can be scheduled into a course. **Example:** Math 100 is before Math 101. When Math 101 is placed in term 3, students in Math 100 can only be scheduled in term 1 or 2.	Build only considers this rule when one paired course has been built (the number of sections must exactly equal sections to build), and there are requests for at least 50% of the possible seats for both paired courses. When the build considers this rule, the paired 'Before' course must be in an earlier term (by term sequence) than the paired 'After' course. When Build encounters this rule and the corresponding section does not exist, the new section is created. When Load encounters this rule, it won't make any changes and continues on to the next request. When the course has multiple terms, the only possible issue would be when the number of terms necessary to build both sections exceeds the total number of terms in the calendar. For example, when both Calculus I and Calculus II need to be scheduled for three terms each, but there are only four terms in the calendar, then Build would be unable to accommodate any requests of this nature.	Y	Y

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Rule	Description	Comments	Build	Load
After	Students take Course 1 after Course 2. This rule limits the terms into which a student can be scheduled into a course. This is the complement of Before. **Example:** Math 101 is after Math 100. When Math 100 is placed in term 1, students in Math 101 can only be scheduled in terms 2, 3 or 4.	Build only considers this rule when one paired course has been built (the number of sections must exactly equal sections to build), and there are requests for at least 50% of the possible seats for both paired courses. When the build considers this rule, the paired 'After' course must be in a later term (by term sequence) than the paired 'Before' course. When Build encounters this rule and the corresponding section does not already exist, it creates a new section. When load encounters this rule, it does not make any changes and continues on to the next request. When the course has multiple terms, the only possible issue would be when the number of terms necessary to build both sections exceeds the total number of terms in the calendar. For example, when both Calculus I and Calculus II need to be scheduled for three terms each, but there are only four terms in the calendar, then Build would be unable to accommodate any requests of this nature.	Y	Y

Rule	Description	Comments	Build	Load
Precedes	Students take Course 1 before Course 2 in consecutive terms (Course 1 happens in Q1, Course 2 happens in Q2). This rule is a stricter version of the Before rule, with the addition that the courses must be in consecutive terms. **Example:** Math 10A precedes Math 10B. When Math 10B is scheduled in term 4, Math 10A can only be scheduled in term 3.	Build only considers this rule when one paired course has been built (the number of sections must exactly equal sections to build) and there are requests for at least 50% of the possible seats for both paired courses. When the build considers this rule, the paired 'Precedes' course must be placed in the term (by term sequence) prior to the paired 'Follows' course. When Build encounters this rule and the corresponding section does not already exist, the new section is created. When Load encounters this rule, it doesn't make any changes and continues on to the next request. Possible issue with multiple terms on Build. When the course has multiple terms, the only possible issue would be when the number of terms necessary to build both sections would exceed the total number of terms in the calendar. For example, when both Calculus I and Calculus II need to be scheduled for three terms each but there are only four terms in the calendar, then Build would be unable to accommodate any requests of this nature.	Y	Y

Rule	Description	Comments	Build	Load
Follows	Students take Course 1 after Course 2 in consecutive terms (Course 1 happens in Q2, Course 2 in Q2). This rule is the complement of the Precedes rule. **Example:** Math 10B follows Math 10A. When Math 10A is scheduled into term 1, Math 10B can only be scheduled in term 2.	Build only considers this rule when one paired course has been built (the number of sections must exactly equal sections to build) and there are requests for at least 50% of the possible seats for both paired courses. When the build considers this rule, the paired 'Follows' course must be placed in the term (by term sequence) after the paired 'Precedes' course. When Build encounters this rule and the corresponding section does not already exist, the new section is created. When Load encounters this rule, it doesn't make any changes and continues on to the next request. Possible issue with multiple terms on Build. When the course has multiple terms, the only possible issue would be when the number of terms necessary to build both sections would exceed the total number of terms in the calendar. For example, when both Calculus I and Calculus II need to be scheduled for three terms each but there are only four terms in the calendar, then Build would be unable to accommodate any requests of this nature.		

Rule	Description	Comments	Build	Load
Consecutive	Students take Course 1 and Course 2 in consecutive terms, but not in any order. **Example:** Math A is scheduled in term 1 and Math B is scheduled in term 2 or Math B is scheduled in term 1 and Math A is scheduled in term 2.	Build only considers this rule when one paired course has been built (the number of sections must exactly equal sections to build) and there are requests for at least 50% of the possible seats for both paired courses. When the build considers this rule, this one paired course must precede or follow the other paired course in the next sequential term (by term sequence). This should not be used with Before/After and Precedes/Follows rules. When the build encounters this rule and the corresponding section does not already exist, the new section is created. When Load encounters this rule, it doesn't make any changes and continues on to the next request.	Y	Y

Rule	Description	Comments	Build	Load
Same Teacher	Students take Course 1 and Course 2 from the same teacher. This also works for team teaching when the same team of teachers teaches both courses. Same teacher is not confused by teachers with the same name. When team teaching is used with the same teacher rule, errors may be encountered when different combinations of the same teachers are used with the rule. **Example:** Spanish A has the same teacher as Spanish B. When Spanish A is taught by Ms. Hernandez, then Spanish B can only be in a section taught by Ms. Hernandez. When used with the Same Period rule, students taking Course 1 from Teacher A in Period 1 in Term 1 are scheduled into Course 2 with Teacher A in Period 1 in Term 2.	Build considers teachers and attempts to create both sections needed to satisfy this rule at the same time; otherwise, it does not place either at that time. Load considers students and teachers, and does not place a student in a section when that placement does not pass this rule.	Y	Y

Rule	Description	Comments	Build	Load
Same Section Number *Previously called Same Section*	Students take the same section number of Course 1 and Course 2. This rule states that the student must be scheduled into the section number of both courses. This allows the same roster of students to move from Course 1 to Course 2. **Example:** Math 10A is the same section as Math 10B. When a student is scheduled into section 1 of Math 10A, the student can only be scheduled into Math 10B section 1. Using this rule in conjunction with other rules often leads to load failures in the Scheduling Board due to logic conflicts.		N	Y

Rule	Description	Comments	Build	Load
Same Period	Students must take Course 1 and Course 2 during the same period but in different terms. This rule states that both courses must be scheduled into a section that meets during the same period number during different terms. **Example:** English 10A is the same period as English 10B. When a student is scheduled into a section of 10A that meets term 1 period 2, English 10B must be scheduled into term 2, 3 or 4 during period 2. When used with the Same Teacher rule, students taking Course 1 from Teacher A in Period 1 in Term 1 are scheduled into Course 2 with Teacher A in Period 1 in Term 2.	This rule only looks at the Period.	Y	Y

Rule	Description	Comments	Build	Load
Same Term *Previously called Same*	Students take Course 1 and Course 2 in different periods of the same term. This rule states that both courses must be scheduled into different periods of the same term. **Example:** English 100 is the same term as Literature 101. When student is scheduled into a section of English 100 during term 1, he must be scheduled into a section of Literature 101 that meets during term 1, but not during the same period.	Build only considers this rule when one paired course has been built, and there are requests for at least 50% of the possible seats for both paired courses. This only looks at the term. This rule should not be used with the Different Term rule.	Y	Y
Different Term *Previously called Not Same*	Students take Course 1 and Course 2 in different terms. This rule states that both courses must be scheduled into different terms. **Example:** Phy Ed 10 is in a different term than Fitness 11. When Phy Ed 10 is scheduled into a section that meets term 2, the student can only be scheduled into a section of Fitness 11 that meets terms 1, 3 or 4.	Build only considers this rule when one paired course has been built, and there are requests for at least 50% of the possible seats for both paired courses. This rule only looks at the term. This rule should not be used with the Same Term rule.	Y	Y

Rule	Description	Comments	Build	Load
Skinny	Students take both Course 1 and Course 2 in the same period/same term without it causing a conflict. This rule states that both courses are scheduled during the same period and the same term. Courses could also be scheduled to meet every other day or every couple weeks. **Skinny takes precedence over many of the others.** **Example:** Careers is skinnied with Chorus during 3rd hour term 1. The student goes to Career half of the hour and Chorus the other half of the hour.		N	Y

Rule	Description	Comments	Build	Load
Combined	More than one course is taught in the same period utilizing the same staff or room, depending on the scenario in which this rule is used. Students are placed following the logic of the Scheduling Board. This information also displays in the Walk-In Scheduler when assigning courses to students. **Staff** This rule states that two courses can be taught in the same classroom by the same teacher. This causes the Scheduling Board to ignore those teacher conflicts. **Example:** Spanish III and Spanish IV courses have low student counts and are combined into the same period with the same staff members.	This rule is only used when loading courses to check for student-to-student conflicts; otherwise, it is ignored.	N	Y
	Room When two or more courses are joined by the combined rule, and placed in the same classroom and period, the combined rule allows the Scheduling Board to view and limit the combined total available seats. The total available seats is determined by the largest Max Seat count of any combined courses taught in that period/room. As students are loaded into any individual combined section, the maximum available seat count of the remaining sections is automatically			

Rule	Description	Comments	Build	Load
	When using the combined rule in this fashion, the logic looks at the period and the room, whether a single staff member teaches all of the combined courses or multiple staff members teach the courses. **Example:** Freshman English has a maximum seat count of 20 students. It is combined with a Special Education section of Freshman English with a maximum seat count of 5 students and a Freshman English section of ESL with a maximum seat count of 5 students. When three students are scheduled into the Special Education section of Freshman English, the maximum seat count of the regular Freshman English course is automatically reduced to 17 students. The total combined maximum seat count cannot exceed the maximum seat count of the largest combined section.			

Rule	Description	Comments	Build	Load
Bind	Students take both Course 1 and Course 2, or neither course can be scheduled. This rule states the student must be scheduled into sections of both courses or neither course. **Using bind can result in increased conflicts.** Some users prefer to have every section of a course sequence scheduled or none at all. In this situation, bind frees up seats for guidance counselors to start hand scheduling the remaining conflicts. **Example:** English 10A binds to English 10B. When the load finishes and the student is only scheduled into a section of 10A and not 10B, then the loader unloads the section of 10A.	Load does not override a locked roster to enforce the rule. After loading, check whether the student is placed in both courses; if not, the student is removed from all sections.	N	Y

Add Scheduling Rules

1. Select the **New Scheduling Rule** icon from the Action bar. A **Scheduling Rule Detail** appears below the Rule List.
2. Verify the desired course appears as the Course 1.
3. Select the correct **Rule** from the dropdown list.
4. Select the correct **Course 2** option for which to apply the rule.
5. Click the **Save** icon when finished.

Read the rule setting once selected. Additional rules can be added as needed.

> Selected courses cannot have a rule tied to itself. The course currently selected DOES NOT display in the Course dropdown for rule selection.

Planning Rules

A Planning Rule defines relationships between courses across years and for a single year, allowing students to choose courses and to effectively plan their Academic Plan. This information is used when students and counselors are determining an Academic Plan for the student.

> Create Planning Rules in **future calendars.**

Planning rules are NOT used in the scheduling process.

Planning Course Rules

Best Practices

When you are using Academic Planning functionality:

- When a year or semester long course is broken down into multiple courses for schedule flexibility, the Parent Of/Child Of rules should be used. Prerequisites for this sort of setup only

need to include or be defined on the Parent course.

- Rule alerts prevent a student from requesting a course without meeting the rule requirements from the transcript, in-progress courses or planned courses.
- Courses that require instructor approval need to have the Allow Student Requests checkbox not marked. Instructors use the Student Course Recommendations to recommend these courses.
- Always verify the Calendar/School selection before saving rules.
- Inactivation of courses requires adjustments to Course Planning Rules.

Planning Rule Detail Editor

Different fields display for different planning rules. Review the table below for details.

Field	Description	Available Rules	Ad hoc Field Name
Rule *Required*	Selection indicates the planning rule that is assigned to the course. See the descriptions and examples below for more information.	All	planningRule.type
Display Value *Required*	Text entered in this field displays on the Portal and should be descriptive enough for both students and counselors to know why the rule was added and what the student needs to do in order to take the course. For example, when the Prerequisite rule was chosen for a course, text should indicate what the prerequisite is (Course Name and Number, minimum grade/GPA received, etc.) and any other information that may be helpful for the student, parent/guardians and counselor. An entry might be "Must take 2221 Alg 2 before taking 2231 Trigonometry."	Prerequisite Concurrent Prerequisite or Concurrent Equivalent Grade Level Course Rotation	planningRule.displayValue

Field	Description	Available Rules	Ad hoc Field Name
Transcript/Course Number(s) *Required*	Values entered here can be course numbers from middle school courses, transcript courses, and transfer credit courses. Wildcard characters like percentage signs can be entered when the course numbers are similar (as in, all course numbers end in 2). **Commas must be entered between courses numbers, as such: "2221,2223,2225" or "2221, 2223, 2225."** When students plan courses through the Portal or a counselor adds the course to a student's academic plan, the entered course numbers are reviewed by the application to ensure the student has not previously taken the course and it does not display on the transcript. Clicking the Preview link displays an HTML view of the entered course numbers and is used to verify the correct courses are included from the current calendar and school.	Prerequisite Concurrent Prerequisite or Concurrent Equivalent	planningRule.transcript CourseNumberString
Credits	Enter the total amount of credits the student needs to earn for the course(s) entered in the Transcript/Courses field.	Prerequisite Concurrent Prerequisite or Concurrent	planningRule.credits
Minimum GPA Value	Enter the lowest GPA value the student can earn for the course(s) entered in the Transcript/Course Number(s) field.	Prerequisite Prerequisite or Concurrent	planningRule.gpaValue

Field	Description	Available Rules	Ad hoc Field Name
Course 2 *Required*	The course that is either the Parent course or the Child course, depending on which rule is being assigned. The inverse of the selection displays on the Course Rules detail of the selected course.	Parent Of Child Of	planningRule.courseID2
Grade Level(s) *Required*	Indicates the grade level of enrollment the course applies. Only students in the assigned grade levels can add the course to their Course Plan for that grade level.	Grade Level	N/A
Allow Course to be Planned Every __ Years *Required*	The entered value indicates the interval of years the course is available. The entered value must be greater than 1.	Course Rotation	N/A
Starting in School Year *Required*	Select the year in which the rotation of the course begins. When the 2018-19 school year is selected and the entered Every __ Year value is 2, the course is available for planning in the 2018-19 school year and again in the 2020-2021 school year, but not in the 2019-2020 school year.	Course Rotation	N/A

Planning Rule Descriptions and Examples

Following are the names and definitions of the available Planning Rules. Make sure that the rules are necessary before assigning them to courses.

Rule	Description	Examples

Rule	Description	Examples
Prerequisite	Students must have completed or planned to complete a course in an earlier year before planning the next course in the sequence. The course numbers entered in the Transcript/Course Number(s) field must be completed or planned before the student can take or plan the selected course. When Parent courses are the prerequisite, enter only the Parent Course number in Transcript/Course Number(s) field and only the Parent Credits in Credits. Entering the sum of the Parent and Child credits triggers an alert message on the Course Plan.	Spanish 1 must be completed (or planned) before Spanish 2.
Concurrent	All course numbers entered into the Transcript/Course Number field must be taken in a single year.	A Chemistry course must be taken during the same year as the Chemistry Lab course.
Prerequisite or Concurrent	Any course in the Transcript/Course Number(s) list must have been taken in a previous year or the same year as the current course.	A school offers Welding 1, Welding 2, Welding 3 and Welding 4 as semester long courses. Welding 1 is taken in the first semester of the school year; Welding 2 is taken in the second semester of the school year or any semester (next year even) following the first semester.
Equivalent	Two courses cover the same content. When an Equivalent planning rule is saved, any courses entered in the Transcript/Course Number(s) field also have an equivalent rule created.	Algebra 1, Honors, Algebra 1, and CBE Algebra 1 might all have different course codes, but when a student takes one Algebra course, he does not need to take the others.

Rule	Description	Examples
Parent Of	This course is the first part of a multi-term course that has been broken up into multiple courses for schedule flexibility. This rule allows the student to request this course and also receive any child courses. **Any other planning rules (Prerequisite, Prerequisite or Concurrent, etc.) must be associated only with the course marked as Parent Of.** When adding this rule, the Course 2 dropdown field lists all active courses from the student's future enrollment calendar.	Foreign language courses are broken into semester long courses (German 1 Semester 1, German 1 Semester 2, etc.). The German 1 Semester 1 course is assigned the Parent Of rule; the German 1 Semester 2 course is assigned the Child Of rule. German 2 Semester 1 is assigned the Prerequisite rule, with the Course Number and Credits from only the Parent, German 1 Semester 1.

Rule	Description	Examples
Child Of	Parent of/Child of rules associate multi-term courses that have been broken up into individual courses for schedule flexibility. Requesting the parent part gives a student a request for all dependent parts. **Any other planning rules (Prerequisite, Prerequisite or Concurrent, etc.) must be associated only with the course marked as Parent Of.** When using this rule, verify that no other planning rules are associated with the Child Of courses. Parent/Child course rules create a built-in expectation in the Course Plan that the student takes both the parent and the child course and earn the credits for both courses. The Child course and its credits should not be included in other planning rules. When adding this rule, the Course 2 dropdown field lists all active courses from the student's future enrollment calendar.	Foreign language courses are broken into semester long courses (German 1 Semester 1, German 1 Semester 2, etc.). The German 1 Semester 1 course is assigned the Parent Of rule; the German 1 Semester 2 course is assigned the Child Of rule. German 2 Semester 1 is assigned the Prerequisite rule, with the Course Number and Credits from only the Parent, German 1 Semester 1. This course is a dependent part of Course 2.
Grade Level	A Grade Level rule indicates the course can only be planned by students (or parents) when they are in that grade level. Counselors do have the ability to override this. More than one grade level can be added, but do not add all grade levels when assigning this rule.	A Senior Seminar may have the 12th grade added. Only students in the 12th grade can plan this for their senior year. However, a student in the 11th grade may be graduating early and is allowed to participate; in this instance, the counselor would need to add the Senior Seminar to the 11th grade student's Course Plan.

Rule	Description	Examples
Course Rotation	This rule is used to mark a course only being available on a rotating basis (i.e., not every year). Enter the interval of years in the Allow Course to be Planned Every __ Years (the value needs to be greater than one), then select the School Year for when the course is first offered.	Astronomy is offered every three years, beginning with the 2018-19 school year. A value of 3 is entered for the Allow Course to Planned field, and the Starting School Year is 2018-19. This means any student can plan this course during the 2018-19 school year, but it won't be offered again until the 2021-2022 school year.

Add Planning Rules

1. Select the **New Planning Rule** from the action bar.
2. Select the **Rule** from the dropdown list.
3. Enter the required information in the appropriate fields based on the descriptions above.
4. For complete planning rule setup, enter the values for the non-required fields based on the descriptions above.
5. Click the **Save** button when finished. The new planning rule displays on the Rule List.