

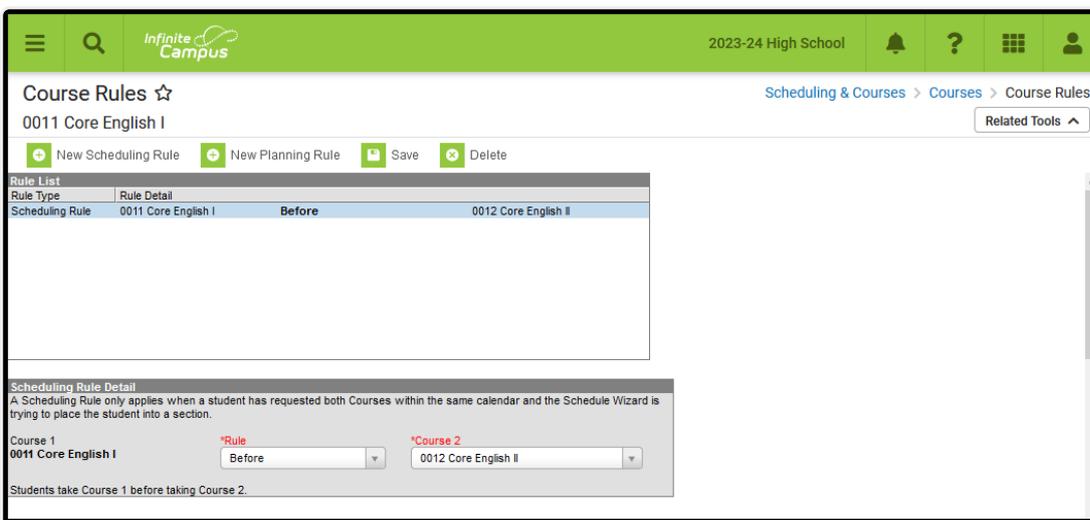
# Course Rules

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## Tool Search: Course Rules

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

This tool allows assigning both Scheduling Rules, used to build and load courses on the Scheduling Board and Walk-In Scheduler, and Planning Rules, used to map a student's progress toward graduation or completion of a program.



*Course Rules*

See the [Course Rules Tool Rights](#) article for information about rights needed to use this tool.

## Scheduling Rules

The [Scheduling Board](#) approaches fulfilling 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 various ways, affecting the Scheduling Board's flexibility. 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 be used only when absolutely necessary to achieve the district's educational goals.

**Scheduling Rules help ensure courses are scheduled appropriately. They are NOT used in the planning process.**

+ New Scheduling Rule
+ New Planning Rule
Save
Delete

| Rule List       |  |              |                    |
|-----------------|--|--------------|--------------------|
| Rule Type       | Rule Detail  |              |                    |
| Scheduling Rule | 1204 ENGLISH 2 (H)   | Same Period  | 1203 ENGLISH 1 (H) |
| Scheduling Rule | 1204 ENGLISH 2 (H)   | Same Teacher | 1203 ENGLISH 1 (H) |
| Planning Rule   | Prerequisite: 1203 is a prereq for 1204 and student must get a 3 on 1203 or 1204 |              |                    |

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**Scheduling Rule Detail**

A Scheduling Rule only applies when a student has requested both Courses within the same calendar and the Schedule Wizard is trying to place the student into a section.

Course 1

**1204 ENGLISH 2 (H)**

*\*Rule*

Same Teacher ▼

*\*Course 2*

1203 ENGLISH 1 (H) ▼

Students take Course 1 and Course 2 by the same teacher.

*Scheduling Rules*

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

## Things to Know

### Build and Load Logic

When the Scheduling Board builds and loads courses, it attempts to place courses and students multiple times based on these rules.

Depending on the complexity of the period schedule, the number of rules associated with courses, the restrictions placed on staff and students, the course may not be placed in the desired manner.

For courses with more restrictive needs (many rules, staff restrictions, etc.), consider manually placing these courses first and locking them. Then use the Build and Load functionality on the Scheduling Board to build and load the remaining courses.

### 50% Request Requirement

Build only considers rules when:

- One paired course has been built where the number of sections must exactly equal the number of sections to build.
- There are requests for at least 50% of the possible seats for both paired courses.

## Scheduling Rule Detail Editor

| Field                              | Description  | Ad hoc Field Name                  |
|------------------------------------|--|------------------------------------|
| <b>Course 1</b><br><i>Required</i> | The course that is currently selected.   | schedRule.courseID1                |
| <b>Rule</b><br><i>Required</i>     | Selection indicates the scheduling rule that is assigned to the course. See the <a href="#">descriptions and examples</a> for more information.  | schedRule.type<br>schedRule.ruleID |
| <b>Course 2</b><br><i>Required</i> | 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                |

## Add Scheduling Rules

See the [Scheduling Rules Descriptions and Examples](#) for details on the available 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 **Course2** 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 help ensure that students take courses in appropriate years and in the appropriate order. They are NOT used to place courses on a student schedule during the scheduling process.**

+ New Scheduling Rule
+ New Planning Rule
Save
Delete

| Rule Type       | Rule Detail   |              |                    |
|-----------------|---|--------------|--------------------|
| Scheduling Rule | 1204 ENGLISH 2 (H)  | Same Period  | 1203 ENGLISH 1 (H) |
| Scheduling Rule | 1204 ENGLISH 2 (H)  | Same Teacher | 1203 ENGLISH 1 (H) |
| Planning Rule   | Prerequisite: Student must have already taken English 1203 in order to take English 1204, and must have received a 3.0 GPA or better in 1203. |              |                    |

**Planning Rule Detail**

A Planning Rule defines relationships between courses across years, allowing students to effectively plan their school career and take courses that fit their needs. Planning rules are not used in the scheduling process.

**\*Rule**  
Prerequisite

Prerequisite means that the student 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 in the previous year before the student can take the selected course.

**\*Display Value**  
Student must have already taken English 1203 in order to take English 1204, and must have received a 3.0 GPA or better in 1203.

**\*Transcript/Course Number(s)**  
1203 Preview

**Credits**  **Min GPA Value**

*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. Parent and child courses must have the same credit type. 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 Rules Detail Editor

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

| Field                                   | Description  | Available Rules  | Ad hoc Field Name         |
|---|--|--|---------------------------|
| <b>Rule</b><br><i>Required</i>          | <p>Selection indicates the planning rule that is assigned to the course. See the <a href="#">descriptions and examples</a> for more information.</p>   | All  | planningRule.type         |
| <b>Display Value</b><br><i>Required</i> | <p>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.</p> <p>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.</p> <p>An entry might be "Must take 2221 Alg 2 before taking 2231 Trigonometry."</p> | Prerequisite<br>Concurrent<br>Prerequisite<br>or<br>Concurrent<br>Equivalent<br>Grade<br>Level<br>Course<br>Rotation | planningRule.displayValue |

| Field   | Description   | Available Rules  | Ad hoc Field Name                                     |
|---|---|--|---|
| <p><b>Transcript/Course Number(s)</b><br/><i>Required</i></p> | <p>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).</p> <p><b>Commas must be entered between courses numbers, as such: "2221,2223,2225" or "2221, 2223, 2225."</b></p> <p>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.</p> <p>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.</p> | <p>Prerequisite<br/>Concurrent<br/>Prerequisite or<br/>Concurrent<br/>Equivalent</p> | <p>planningRule.transcript<br/>CourseNumberString</p> |
| <p><b>Credits</b></p>   | <p>Enter the total amount of credits the student needs to earn for the course(s) entered in the Transcript/Courses field.</p>   | <p>Prerequisite<br/>Concurrent<br/>Prerequisite or<br/>Concurrent</p>                | <p>planningRule.credits</p>                           |
| <p><b>Minimum GPA Value</b></p>                               | <p>Enter the lowest GPA value the student can earn for the course(s) entered in the Transcript/Course Number(s) field.</p>  | <p>Prerequisite<br/>Prerequisite or<br/>Concurrent</p>                               | <p>planningRule.gpaValue</p>                          |

| Field   | Description  | Available Rules       | Ad hoc Field Name      |
|---|--|-----------------------|------------------------|
| <b>Course 2</b><br><i>Required</i>                                  | 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 and child courses must have the same credit type.                                | Parent Of<br>Child Of | planningRule.courseID2 |
| <b>Grade Level(s)</b><br><i>Required</i>                            | 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                    |
| <b>Allow Course to be Planned Every __ Years</b><br><i>Required</i> | The entered value indicates the interval of years the course is available. The entered value must be greater than 1.   | Course Rotation       | N/A                    |
| <b>Starting in School Year</b><br><i>Required</i>                   | 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                    |

## Add Planning Rules

See the [Planning Rules Descriptions and Examples](#) for details on the available 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.

## 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 should also 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.

The screenshot shows a 'Select categories & fields' dialog box. At the top, there is a 'Filter By' dropdown set to 'rules', with 'Search' and 'Clear' buttons. Below this is a tree view of 'All Fields' under the 'Course' category. The tree is expanded to show 'Scheduling Rules' and 'Planning Rules' sub-categories. Under 'Scheduling Rules', fields include ruleID, courseID1, courseID2, and type. Under 'Planning Rules', fields include prereqID, courseID, type, required, displayValue, transcriptCourseNumberString, credits, gpaValue, and courseID2. A 'Selected Fields' list on the right contains the following fields: schedRule.ruleID, schedRule.courseID1, schedRule.courseID2, schedRule.type, ruleCourse.courseID, ruleCourse.courseNumber, ruleCourse.courseName, planningRule.prereqID, planningRule.courseID, planningRule.type, planningRule.required, planningRule.displayValue, planningRule.transcriptCourseNumberString, planningRule.credits, planningRule.gpaValue, planningRule.courseID2, planCourse.courseID, planCourse.courseNumber, and planCourse.courseName. At the bottom of the dialog, there are 'Add Function' and 'Edit Function' buttons.

*Course Rules Available in Ad hoc Reporting*