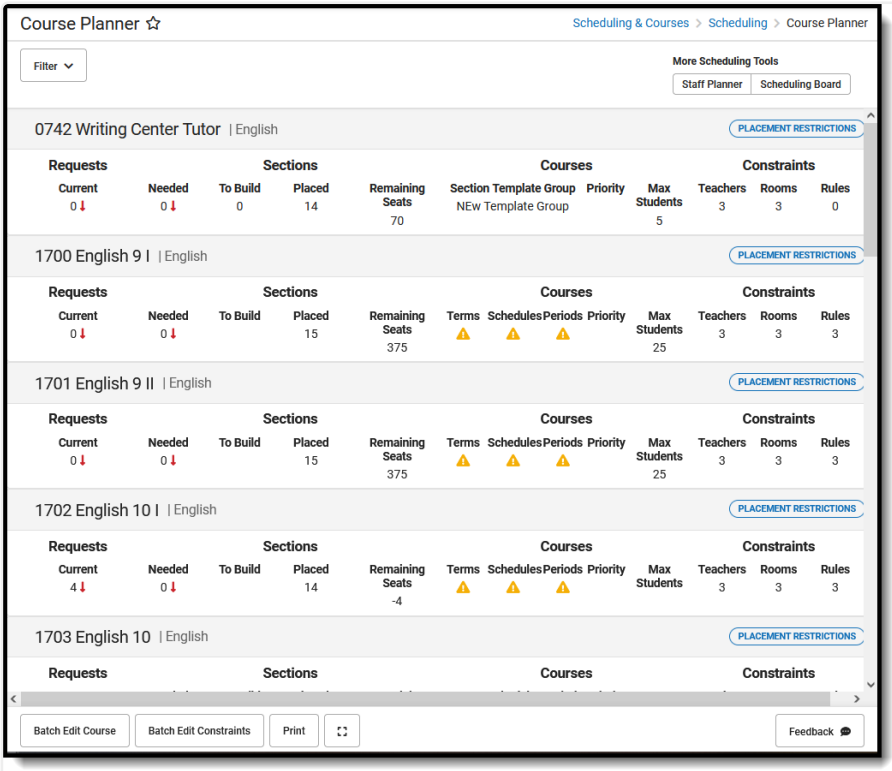
Course Planner

Last Modified on 11/09/2026 10:16 am CST

Path: Scheduling & Courses > Scheduling > 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

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.

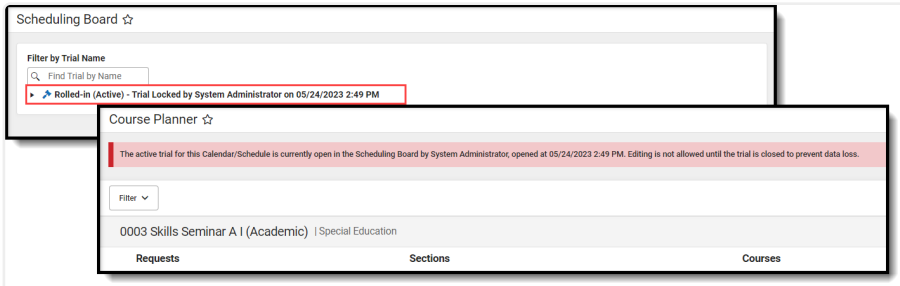
Navigation of Course Planner

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.)

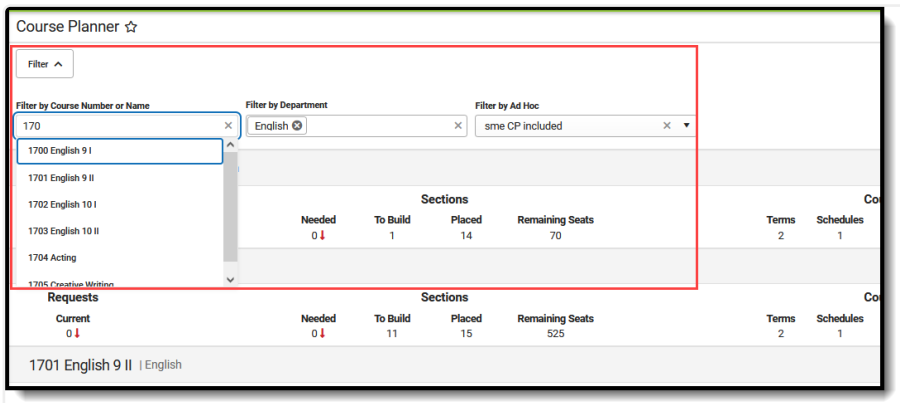
Changes made in Course Planner in a locked trial cannot be saved.



Locked 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 Filter Options

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

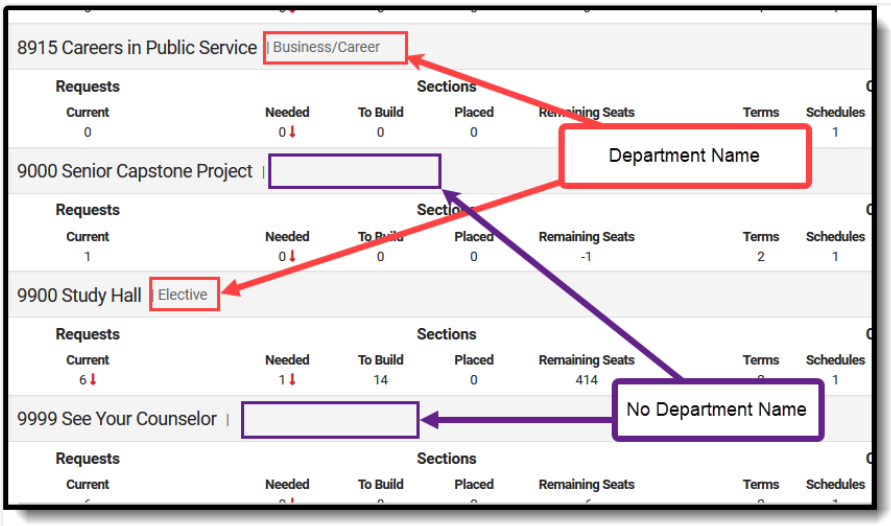
- **Filter by Course Number or Name**. When a course is selected here, only that course's information displays. This is helpful when a course has specific constraints for the teacher or for the room. For courses like Physical Education or Cooking, where those courses meet are very specific - GYM or FOOD 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 Departmen**t. 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.

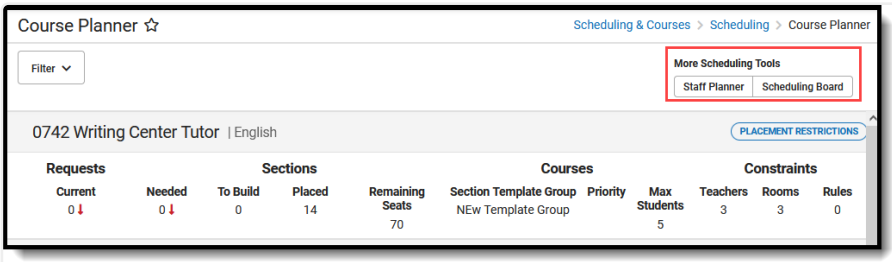


Course Planner - Department Name vs. No Department Name

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.



Access to Staff Planner and Scheduling Board

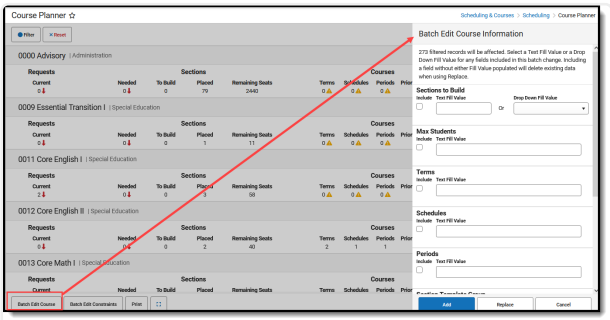
Action Bar Options

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.

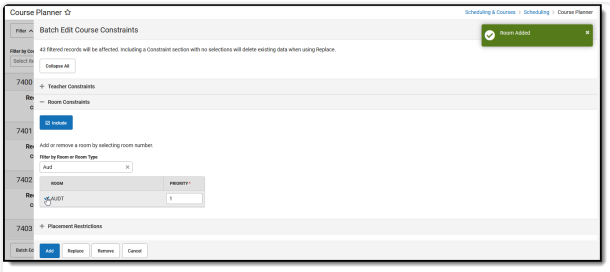


Batch Edit Course

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.

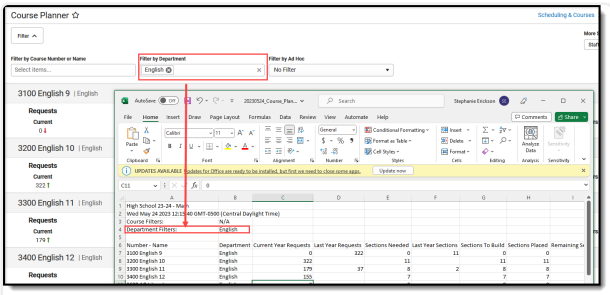
It is recommended that Filter options be added prior to using this option.



Batch Edit Constraints

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.

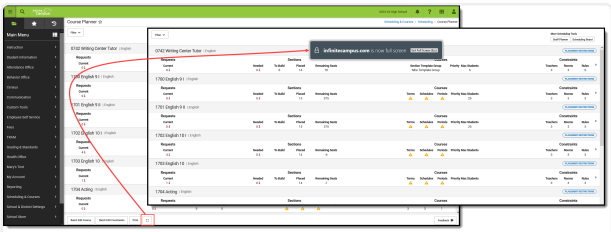
When the list of courses is filtered, only those courses that meet the filter options are included in the .csv export. In the example to the right, the Filter by Department field is set to English, so only courses assigned to the English department display in the tool AND in the spreadsheet.



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.

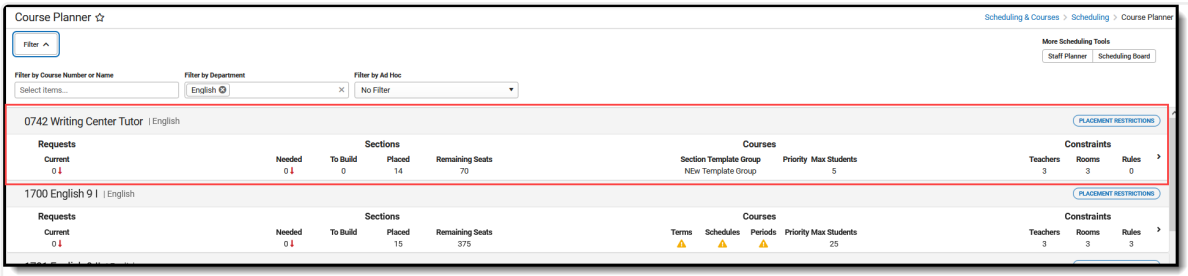
Click the button again or use the ESC key to return to standard view.



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.



Course Planner Layout

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.

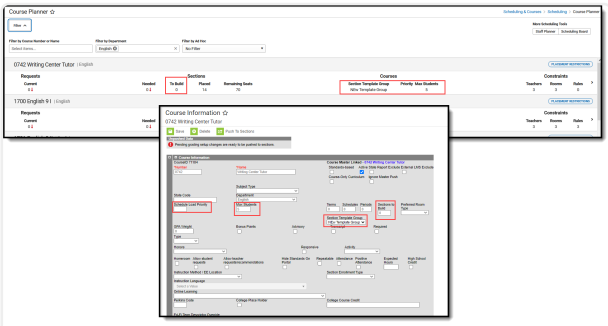


Course Planner Display

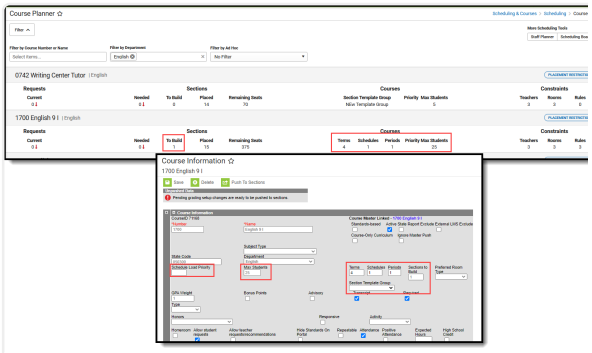
The **Section Template Group** and **Max Students** under **Courses** and the **To Build** value under **Sections** reports the information from the Course Information editor.

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.
- **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.



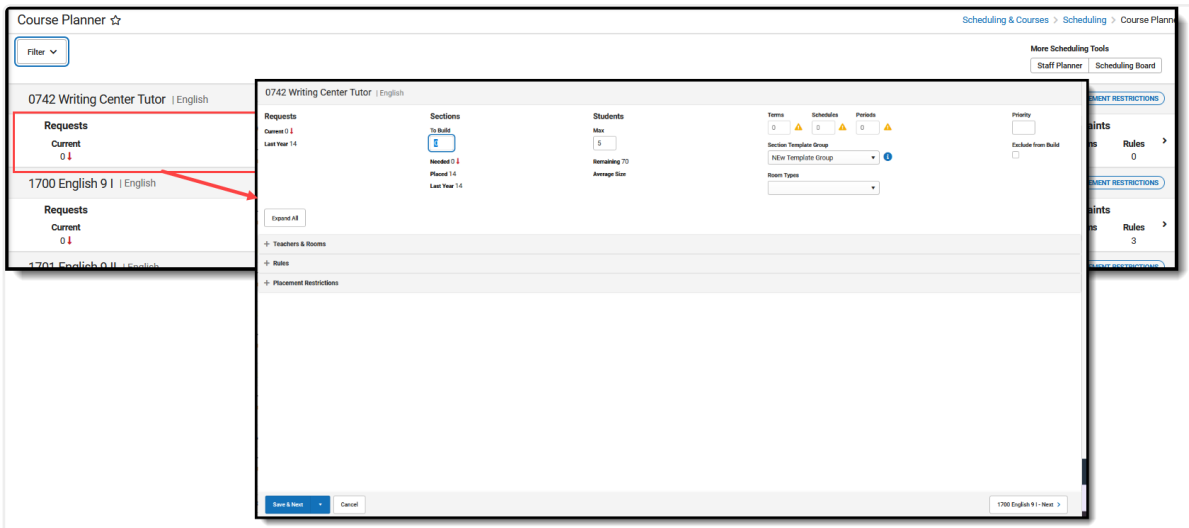
Course Planner, Course Information Fields with Section Template Group



Course Planner, Course Information Fields without Section 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.

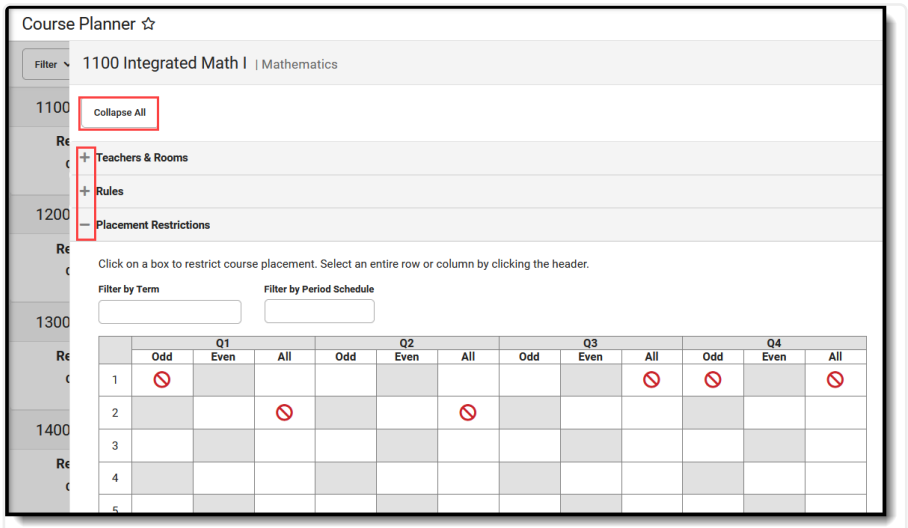


Course Planner Side Panel

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

Collapse or Expand Course Planner Cards

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**.



Expand or Collapse Course Planner Cards

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.

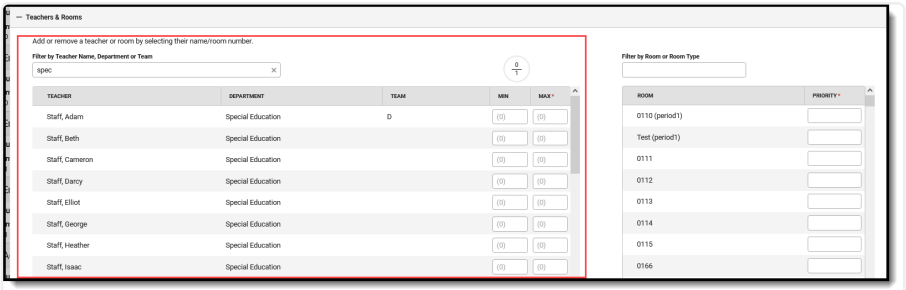
To not save any changes made in the side panel, click **Cancel**.

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.

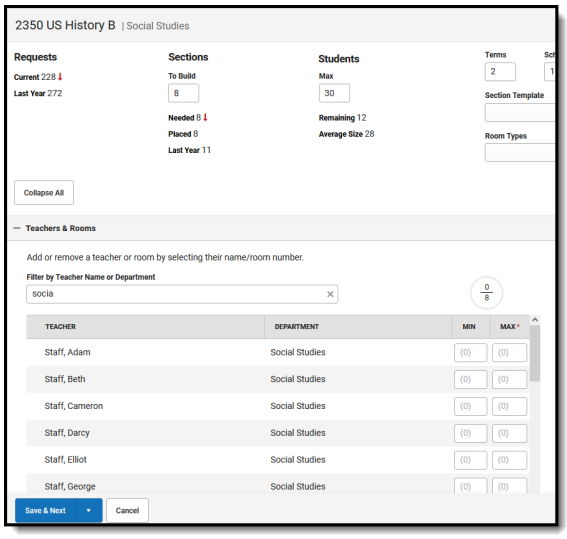
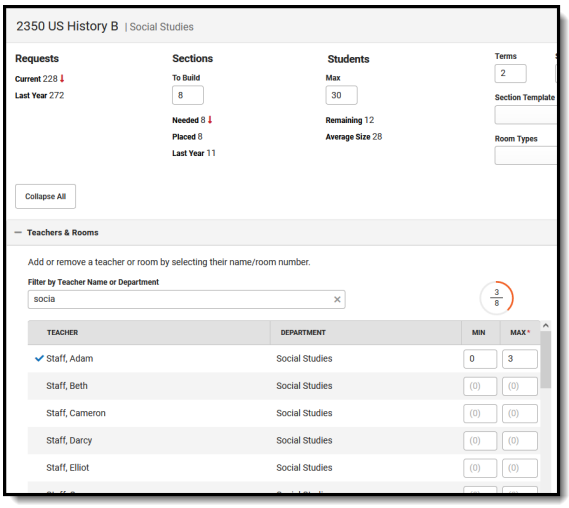


Assigning Teachers to a Course

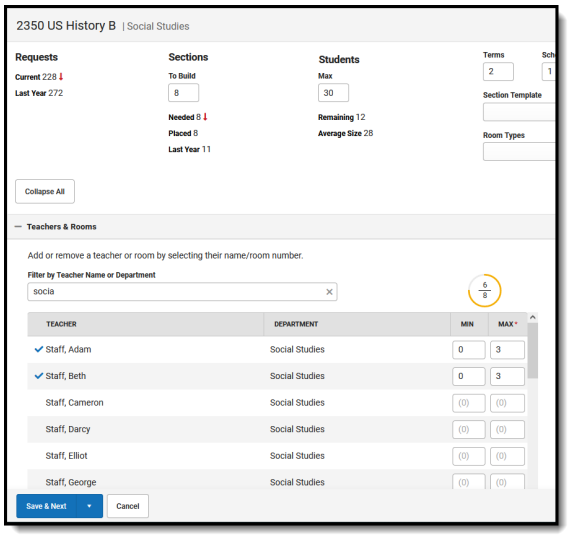
Filter the list of teachers by their Name (first name or last name) or Department name, or Team (Scheduling Group). The filter fields are dynamic, meaning any text entered into them instantly filters the options to list matching results.

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.

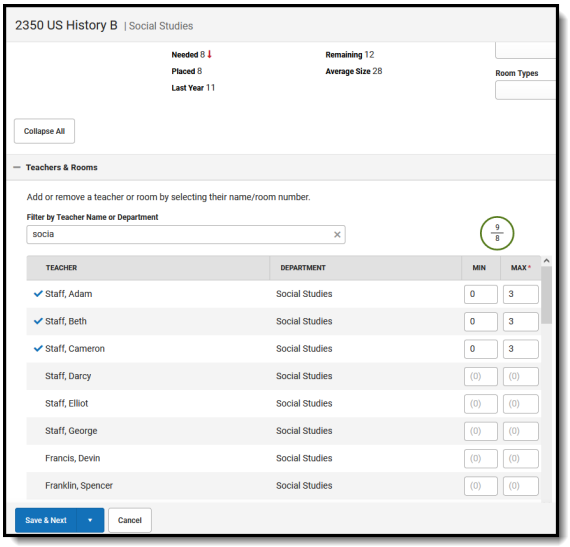
For the US History class, eight sections are needed to meet the number of student requests. Each assigned teacher has a maximum section value of 3 (this is default value that can be changed if needed). That means at least three teachers are needed to have a complete (green) Progress Dial.

No Assigned Teachers	One Assigned Teacher
	
Two Assigned Teachers	**Three Assigned Teachers**

No Assigned Teachers



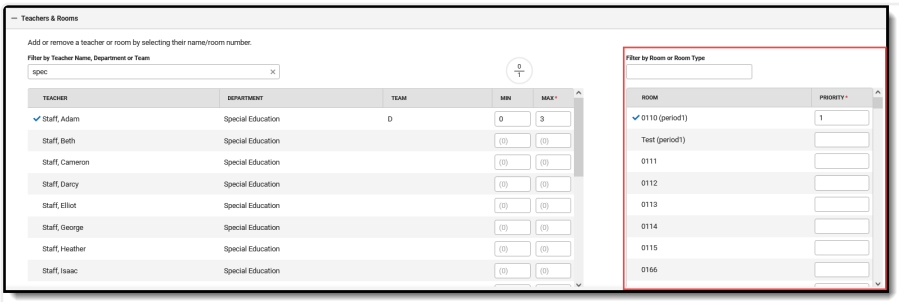
One Assigned Teacher



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.



Assigning Rooms to Courses

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.

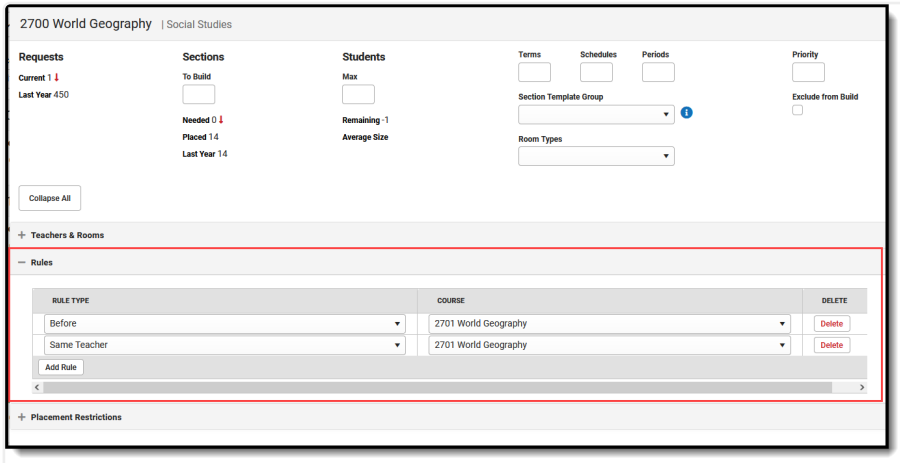
To aid with Academic Planning, there are different types of rules that can be added to courses - Scheduling

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.



Course Planner Rules

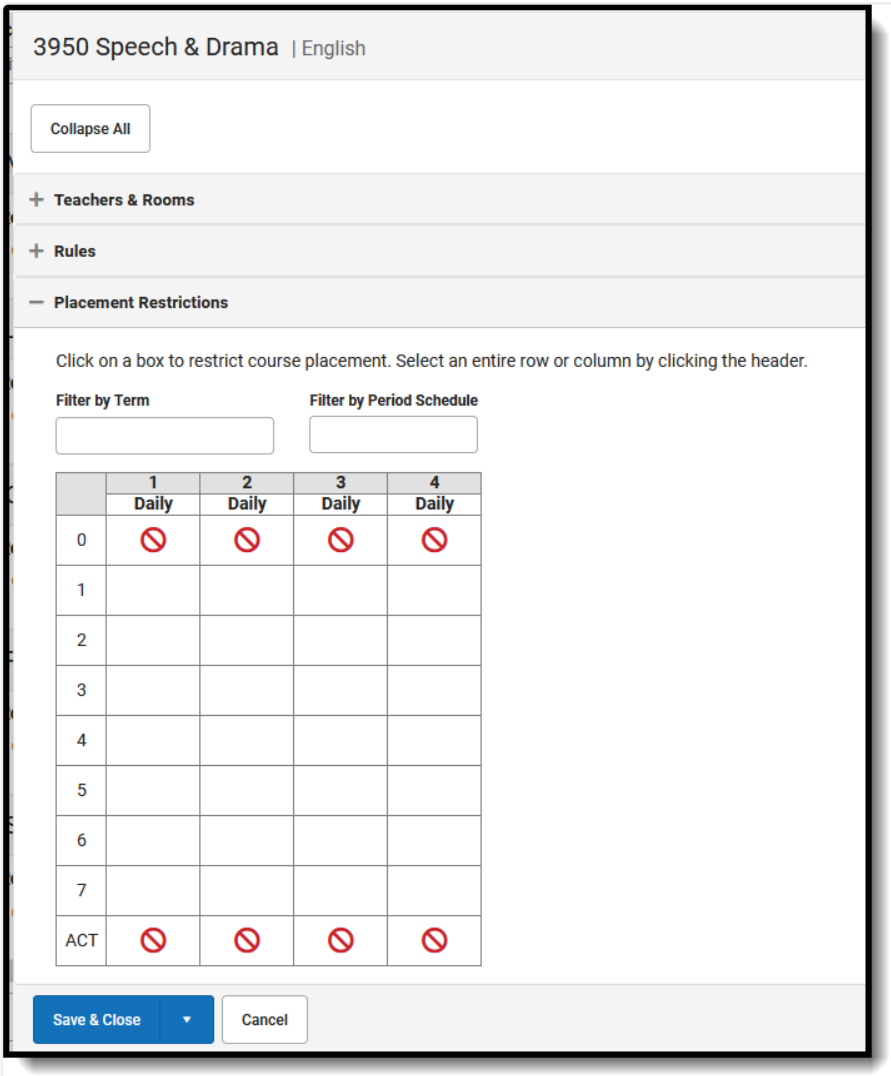
See the Scheduling Rule Descriptions and Examples for detailed explanation of the available rules.

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.

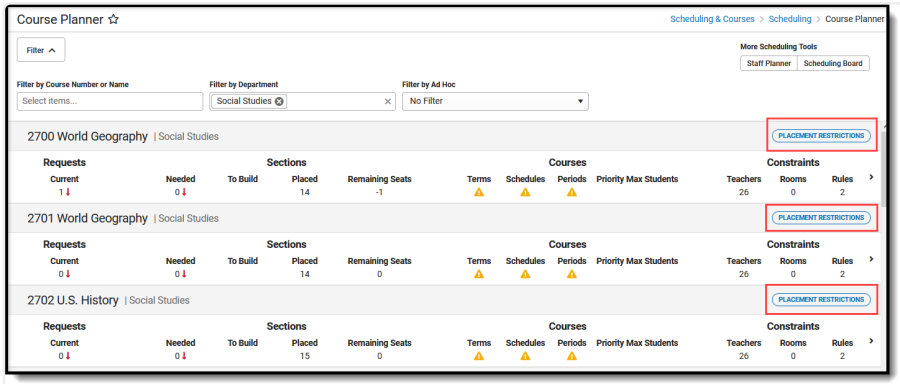


Placement Restrictions

When a restriction is added, the No Symbol ( ) 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.



Placement Restriction Label

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.

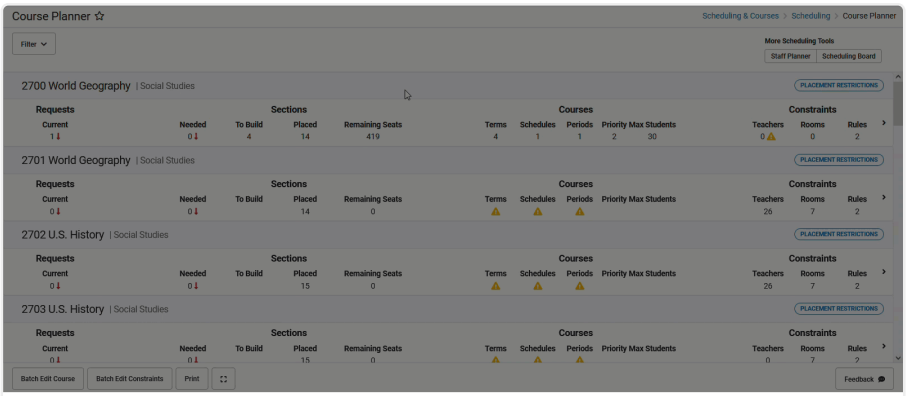


Adjust Course Information

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.
5. 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 Teachers to Courses

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.



Assign Rooms to Courses

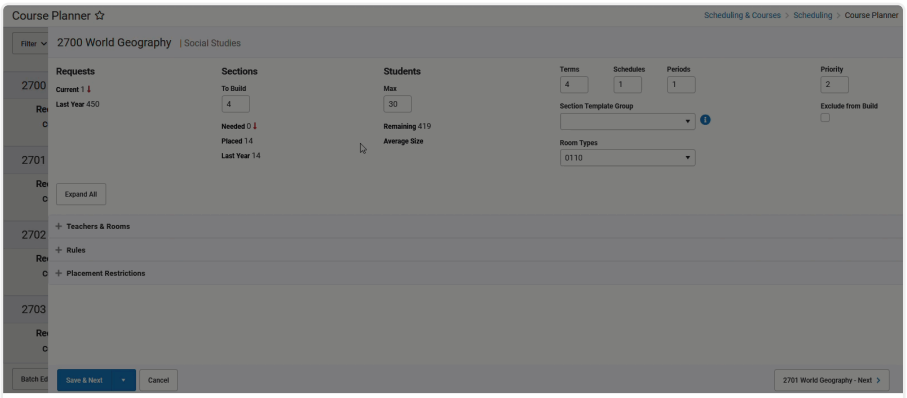
Assign Rules to Courses

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.



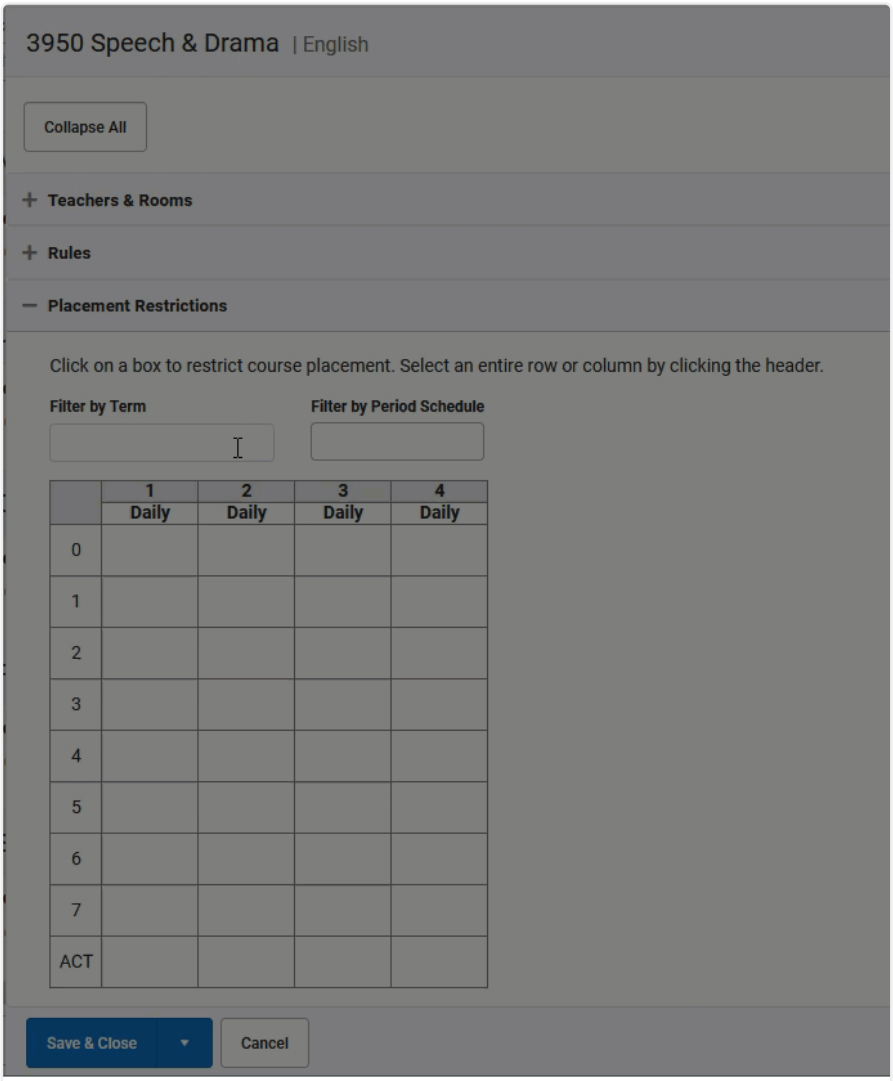
Add Rules

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.



Add Placement Restrictions

Previous and Next Course

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.



Previous and Next Courses

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.



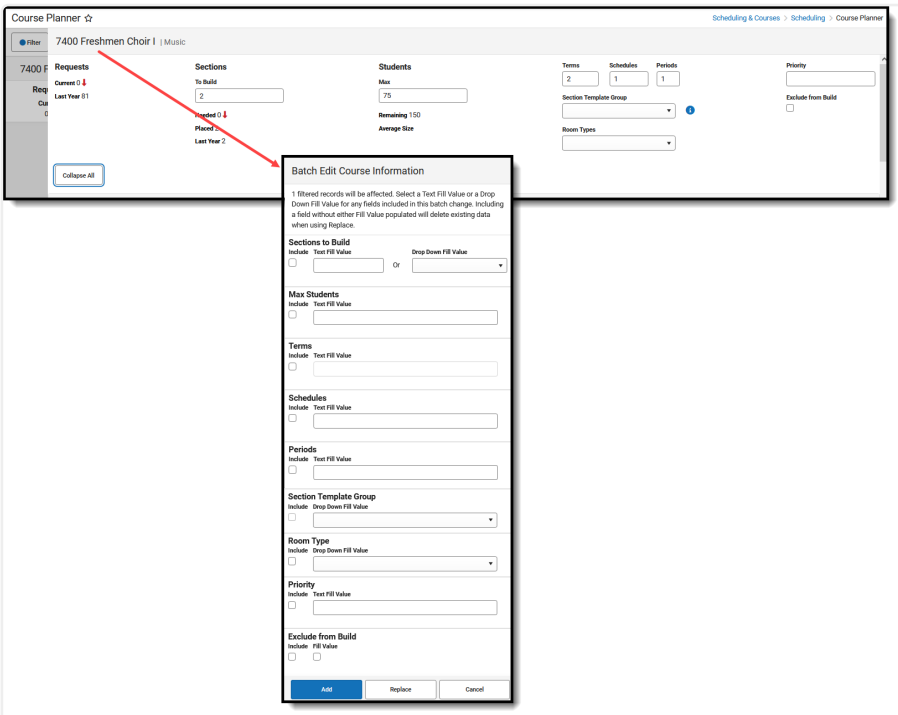
Batch Edit Course - Filtered Records

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.



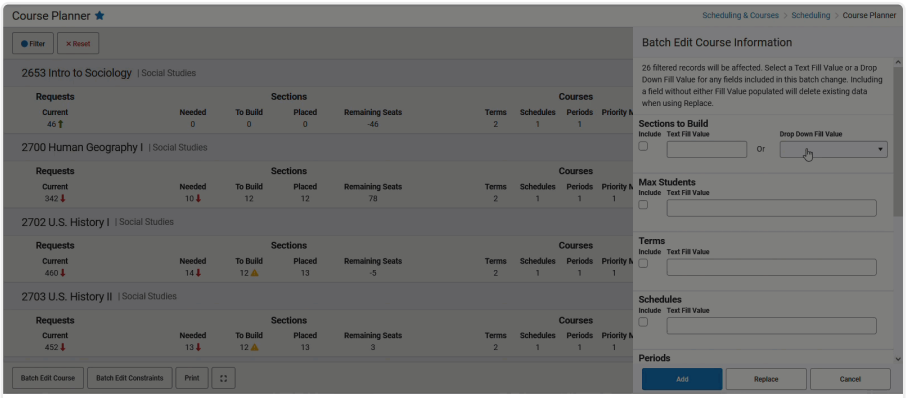
Available Course Information Fields

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.



Add Course Values Using Batch Edit Course

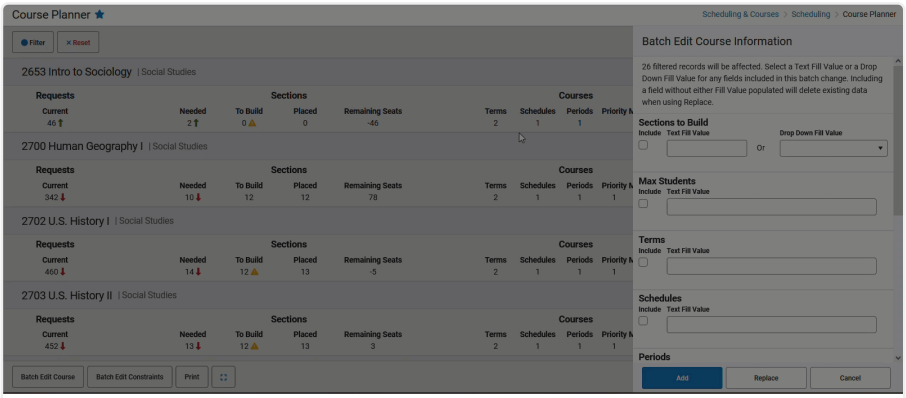
Replace Course Information

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.



Replace Course Values - Batch Edit Courses

Batch Edit Constraints

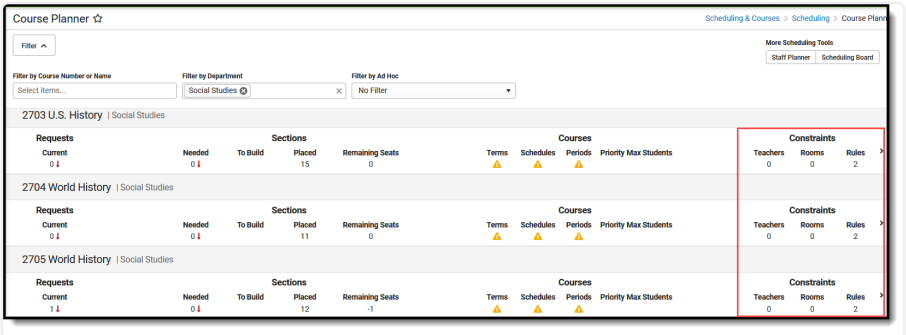
Batch Edit Constraints modifies the Teacher and Room Constraints and Placement Restrictions for the filtered courses by **adding** constraints where values did not previously exist (blank values); by **replacing** existing values with new values; or by **removing** existing values.

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.

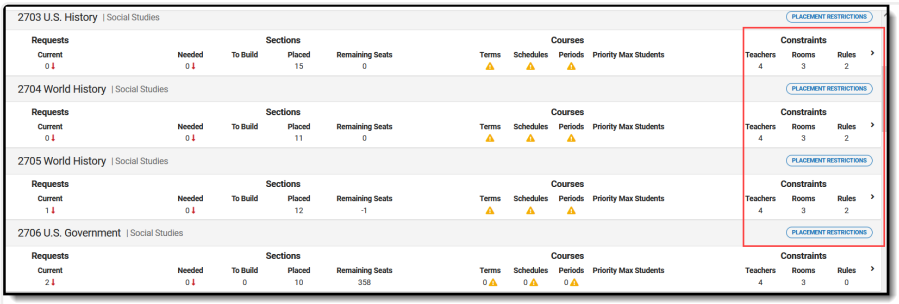


Course Planner - No Assignments

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.
    - 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.

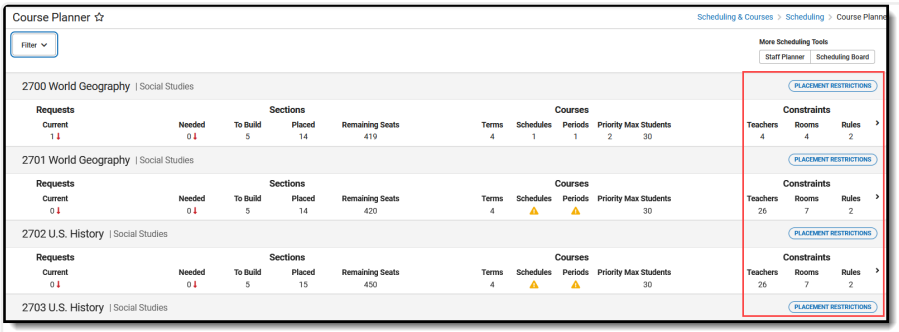


Course Planner - Add Constraints

Replace Constraints

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

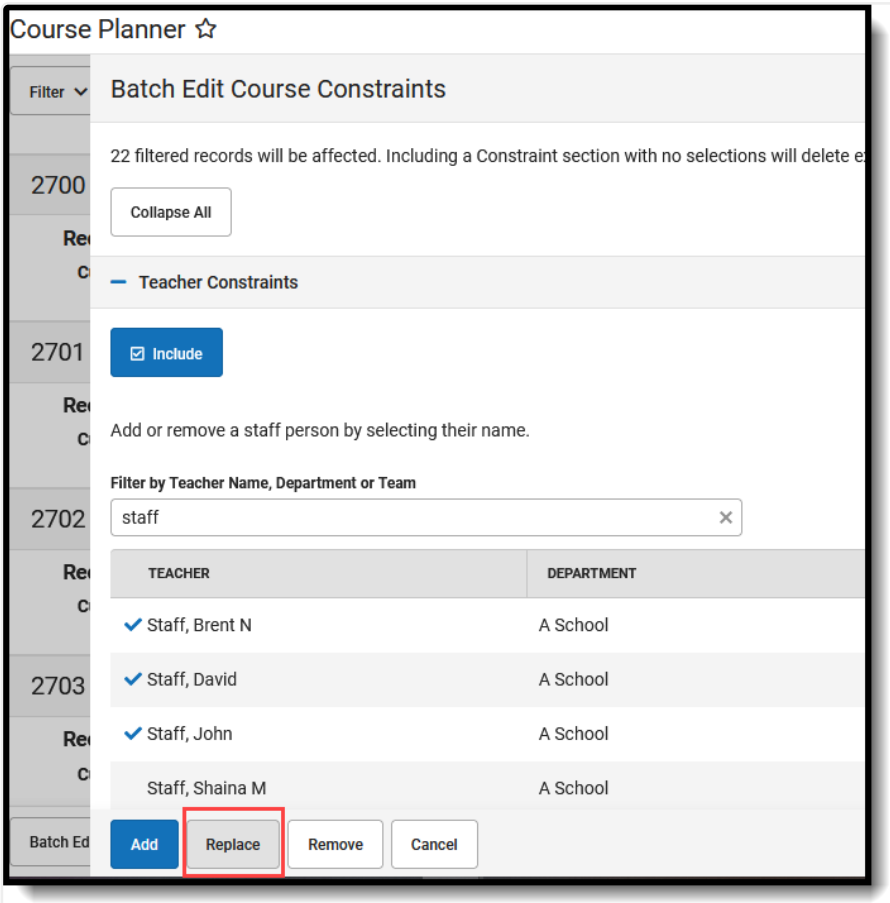
Instead of the four teachers and three rooms that are currently assigned to these courses, there needs to be three different teachers and three different rooms assigned.



Course Planner - Currently Assigned Values

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.

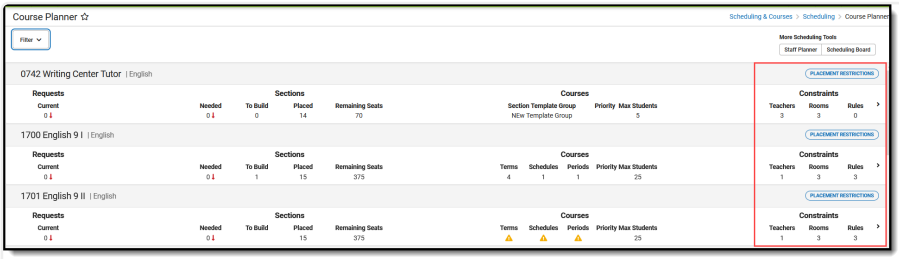


Batch Edit Constraints - Replace Option

Remove Constraints

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 - 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.
    - Select the same rooms that are currently assigned to the courses.
    - 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.