

Course Planner [.2315 - .2319]

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You are viewing a previous version of this article. See [Course Planner](#) for the most current information.

[Tool Rights](#) | [Navigation of Course Planner](#) | [Course Planner Layout](#) | [Modify Course Plan Information](#) | [Next Steps](#)

Classic View: Scheduling > Scheduling Center > Course Planner

Search Terms: 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.

The Course Planner tool that is available through the Schedule Wizard is still available and can be used interchangeably with this new Course Planner.

The screenshot shows the Course Planner interface with four course sections listed:

- 3100 English 9 | English**
 - Requests: Current 220, Needed 9, To Build 8.
 - Sections: Placed 9, Remaining Seats 5.
 - Courses: Terms 4, Schedules 1, Periods 1, Priority 25, Max Seats 25.
 - Constraints: Teachers 3, Rooms 3, Rules 0.
- 3175 H English 9 | English**
 - Requests: Current 2, Needed 0, To Build 1.
 - Sections: Placed 1, Remaining Seats 23.
 - Courses: Terms 4, Schedules 1, Periods 1, Priority 25, Max Seats 25.
 - Constraints: Teachers 1, Rooms 1, Rules 0.
- 3200 English 10 | English**
 - Requests: Current 228, Needed 10, To Build 10.
 - Sections: Placed 10, Remaining Seats 22.
 - Courses: Terms 4, Schedules 1, Periods 1, Priority 25, Max Seats 25.
 - Constraints: Teachers 3, Rooms 3, Rules 0.
- 3275 H English 10 | English**
 - Requests: Current 0, Needed 0, To Build 0.
 - Sections: Placed 0, Remaining Seats 0.
 - Courses: Terms 0, Schedules 0, Periods 0, Priority 0, Max Seats 0.
 - Constraints: Teachers 0, Rooms 0, Rules 0.

Course Planner

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.

Tool Rights

Classic View: System Administration > User Security > Users > Tool Rights > Scheduling > Scheduling Center > Course Planner

Access to the Course Planner requires the following:

Read Rights:

- Access Course Planner.
- View Course Planner cards, including detail information (list of courses, etc.).
- Filter list of courses.
- Open and view the Course Planner Side Panel.
- Navigate records in the Course Planner Side Panel.
- Print a CSV download of the courses.
- Use the Full Screen option.

Write Rights:

- Edit and save changes to the Course Planner Side Panel.

Add and Delete rights provide no additional functionality.

Tool Rights 

admin

Search Campus Tools

course planner

Tool Rights

- ▶ Instruction
- ▶ Student Information
- ▶ Attendance Office
- ▶ Behavior Office
- ▶ Census
- ▶ Communication
- ▶ Employee Self Service
- ▶ Fees
- ▶ FRAM
- ▶ Grading & Standards
- ▶ Health Office
- ▶ My Account
- ▶ Reporting
- ▶ Scheduling & Courses
 - ▶ Scheduling
 - Scheduling Center
 - Course Planner**
 - Scheduling Board
 - Staff Planner

- All
- All Read Write Add Delete

Course Planner Tool Rights

Navigation of Course Planner

[Filter Options](#) | [More Scheduling Tools](#) | [Access to Staff Planner and Scheduling Board](#) [Action Bar Options](#)

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

Filter Options

Use the **Filter by Course Number or Name** and/or **Filter by Department** 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 by Course Number or Name: 31 | Filter by Department: English

Requests			Sections			Courses		
Current	Needed	To Build	Placed	Remaining Seats	Terms	Schedules	Periods	Planned
2 ↓	0 ↓	1	1	23	4	1	1	1

3175 H English 9 | English

Requests			Sections			Courses		
Current	Needed	To Build	Placed	Remaining Seats	Terms	Schedules	Periods	Planned
2 ↓	0 ↓	1	1	23	4	1	1	1

3200 English 10 | English

Course Planner 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 (System Administration > Resources > Resources > Departments) and Departments must be assigned to the [Course](#) (Scheduling > Courses > Course > Course Information; Grading & Standards > Course Masters > Course Master Information).

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.

8915 Careers in Public Service	Business/Career	Requests	Sections	0	0	0	0	0	0	0	0
Current	Needed	To Build	Placed	Remaining Seats	Terms	Schedules					
0	0 ↓	0	0	0	1	1					
9000 Senior Capstone Project											
Requests	Section	Department Name									
Current	Needed	To Build	Placed	Remaining Seats	Terms	Schedules					
1	0 ↓	0	0	-1	2	1					
9900 Study Hall	Elective										
Requests	Sections										
Current	Needed	To Build	Placed	Remaining Seats	Terms	Schedules					
6 ↓	1 ↓	14	0	414	0	1					
9999 See Your Counselor											
Requests	Sections										
Current	Needed	To Build	Placed	Remaining Seats	Terms	Schedules					
0	0	0	0	0	0	0					

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.

Course Planner ☆	Scheduling & Courses > Scheduling > Course Planner
Filter by Course Number or Name:	Filter by Department:
Select items...	English  X
3100 English 9 English	
Requests	More Scheduling Tools
Current	Staff Planner Scheduling Board
Needed	
To Build	
Placed	
Remaining Seats	
Terms	
Schedules	
Periods	
Priority	
Max Seats	
Teachers	
Rooms	
Rules	

Access to Staff Planner and Scheduling Board

Action Bar Options

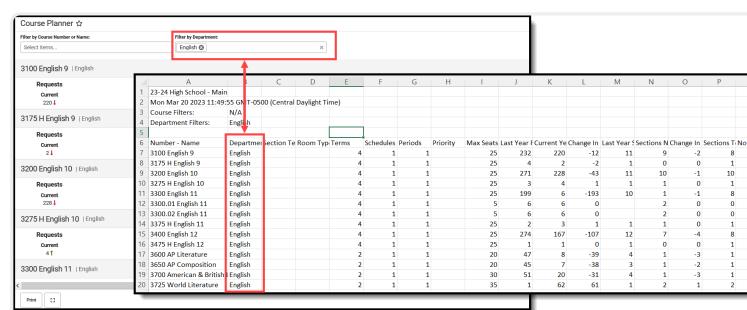
Across the bottom of the Course Planner is the Action Bar. Available functions are the ability to print the course information and to view the Course Planner in full screen mode.

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.

The Course Planner can be viewed in full screen if needed. 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.



Course Planner																											
Filter by Course Number or Name:		Filter by Department:																									
Select Items...		Select Items...																									
23-24 High School - Main																											
Mon Mar 20 2023 11:49:50 -0500 (Central Daylight Time)																											
3100 English 9 (English)																											
Requests		Courses																									
Current		220 1																									
3175 H English 9 (English)		23-24 High School - Main																									
Requests		N/A																									
3200 English 10 (English)		Department Filters: English																									
Requests		Courses																									
Current		220 1																									
3275 H English 10 (English)		23-24 High School - Main																									
Requests		N/A																									
3300 English 11 (English)		Department Filters: English																									
Requests		Courses																									
Current		220 1																									
3375 H English 11 (English)		23-24 High School - Main																									
Requests		N/A																									
3400 English 12 (English)		Department Filters: English																									
Requests		Courses																									
Current		220 1																									
3475 H English 12 (English)		23-24 High School - Main																									
Requests		N/A																									
3650 AP Composition (English)		Department Filters: English																									
Requests		Courses																									
Current		220 1																									
3700 American & British (English)		23-24 High School - Main																									
Requests		N/A																									
3725 World Literature (English)		Department Filters: English																									
Requests		Courses																									
Current		220 1																									
3775 H English 11 (English)		23-24 High School - Main																									
Requests		N/A																									
3781 H English 11 (English)		Department Filters: English																									
Requests		Courses																									
Current		220 1																									
3781 H English 11 (English)		23-24 High School - Main																									
Requests		N/A																									
3781 H English 11 (English)		Department Filters: English																									
Requests		Courses																									
Current		220 1																									
3781 H English 11 (English)		23-24 High School - Main																									
Requests		N/A																									
3781 H English 11 (English)		Department Filters: English																									
Requests		Courses																									
Current		220 1																									
3781 H English 11 (English)		23-24 High School - Main																									
Requests		N/A																									
3781 H English 11 (English)		Department Filters: English																									
Requests		Courses																									
Current		220 1																									
3781 H English 11 (English)		23-24 High School - Main																									
Requests		N/A																									
3781 H English 11 (English)		Department Filters: English																									
Requests		Courses																									
Current		220 1																									
3781 H English 11 (English)		23-24 High School - Main																									
Requests		N/A																									
3781 H English 11 (English)		Department Filters: English																									
Requests		Courses																									
Current		220 1																									
3781 H English 11 (English)		23-24 High School - Main																									
Requests		N/A																									
3781 H English 11 (English)		Department Filters: English																									
Requests		Courses																									
Current		220 1																									
3781 H English 11 (English)		23-24 High School - Main																									
Requests		N/A																									
3781 H English 11 (English)		Department Filters: English																									
Requests																											

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.

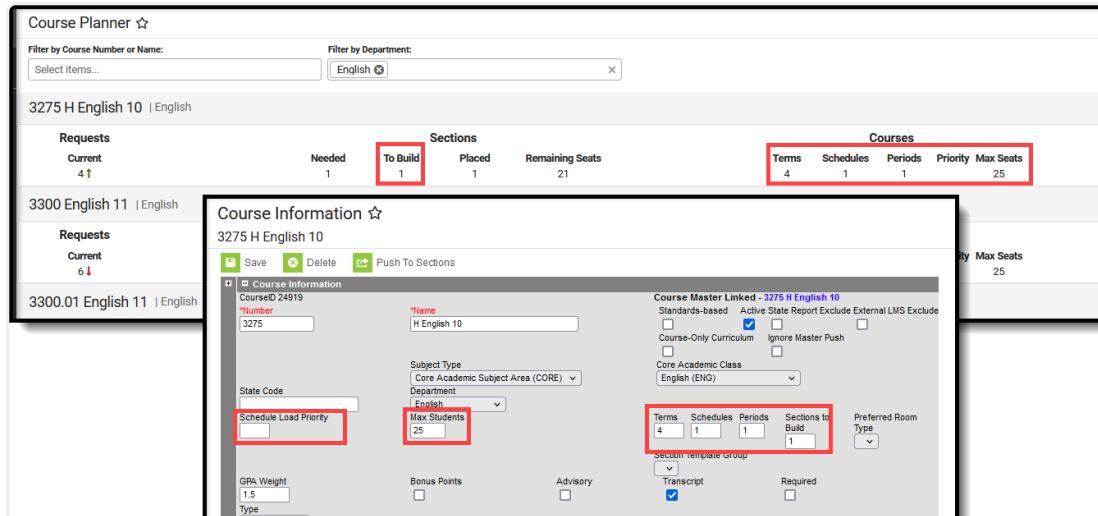
- A **red** down arrow indicates the number of requests is lower than the number of Requests/Sections Needed in the last year.
- A **green** up arrow indicates the number of requests is higher than the number of Requests/Sections Needed in the last year.
- A **yellow** caution triangle indicates one 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.

Requests		Sections		
Current	Needed	To Build	Placed	Remaining Seats
4 ↑	1	1	1	21
3300 English 11 English				
Requests		Sections		
Current	Needed	To Build	Placed	Remaining Seats
6 ↓	1 ↓	8	9	209
3300.01 English 11 English				
Requests		Sections		
Current	Needed	To Build	Placed	Remaining Seats
6	2 ↑	0 ⚠	0	-6
3300.02 English 11 English				
Sections to build is less than the amount needed.				
Requests		Sections		
Current	Needed	To Build	Placed	Remaining Seats
6	2 ↑	0 ⚠	0	-6

Course Planner Display

The **Terms/Schedules/Periods/Max Seats** values in under **Courses** and the **To Build** value under **Sections** reports the information from the [Course Information](#) editor.

- **Max Seats** (e.g., Max Students on the Course Information editor) 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 ☆

Filter by Course Number or Name: Select Items... Filter by Department: English

3275 H English 10 | English

Requests
Current 4↑

Needed 1 To Build 1 Sections Placed 1 Remaining Seats 21

Courses
Terms 4 Schedules 1 Periods 1 Priority Max Seats 25

3300 English 11 | English

Requests
Current 6↓

3300.01 English 11 | English

Course Information ☆

3275 H English 10

Save Delete Push To Sections

Course Information

CourseID 24919
*Number 3275
*Name H English 10

Subject Type Core Academic Subject Area (CORE)
Department English

State Code Schedule Load Priority
Max Students 25

GPA Weight 1.5
Type

Bonus Points Advisory

Course Master Linked - 3275 H English 10
Standards-based Active State Report Exclude External LMS Exclude
Course-Only Curriculum Ignore Master Push
Core Academic Class English (ENG)

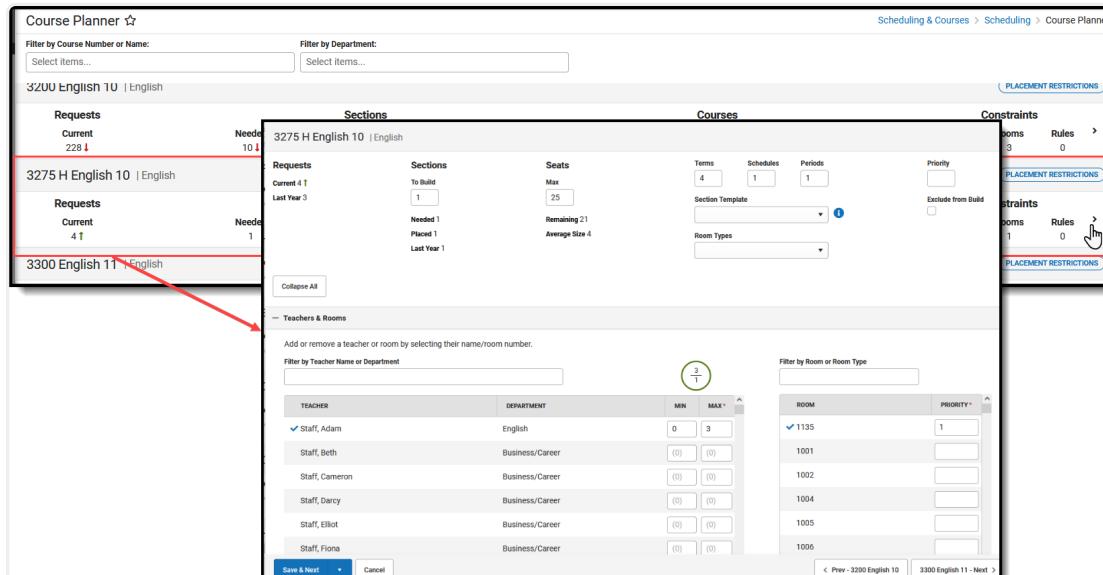
Terms 4 Schedules 1 Periods 1 Sections to Build 1 Preferred Room Type

Section Template Group Transcript Required

Course Planner, Course Information Fields

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 ☆

Filter by Course Number or Name: Select Items... Filter by Department: Select Items...

3275 H English 10 | English

Requests
Current 228↓

Needed 10↑

3275 H English 10 | English

Requests
Current 4↑

Needed 1

3300 English 11 | English

Sections

3275 H English 10 | English

Requests
Current 4↑ Last Year 3

Needed 1

Sections
To Build 1 Seats Max 25 Remaining 21 Average Size 4

Rooms
Priority 3
Section Template
Room Types

Constraints
Rooms 3 Rules 0
PLACEMENT RESTRICTIONS
Rooms 1 Rules 0
PLACEMENT RESTRICTIONS
Rooms 1 Rules 0
PLACEMENT RESTRICTIONS

Teachers & Rooms

Teachers & Rooms

TEACHER DEPARTMENT MIN MAX
Staff, Adam English 0 3
Staff, Beth Business/Career (0) (0)
Staff, Cameron Business/Career (0) (0)
Staff, Darcy Business/Career (0) (0)
Staff, Elliot Business/Career (0) (0)
Staff, Fiona Business/Career (0) (0)

ROOM ROOM
1135 1
1001
1002
1004
1005
1006

Filter by Room or Room Type
Priority

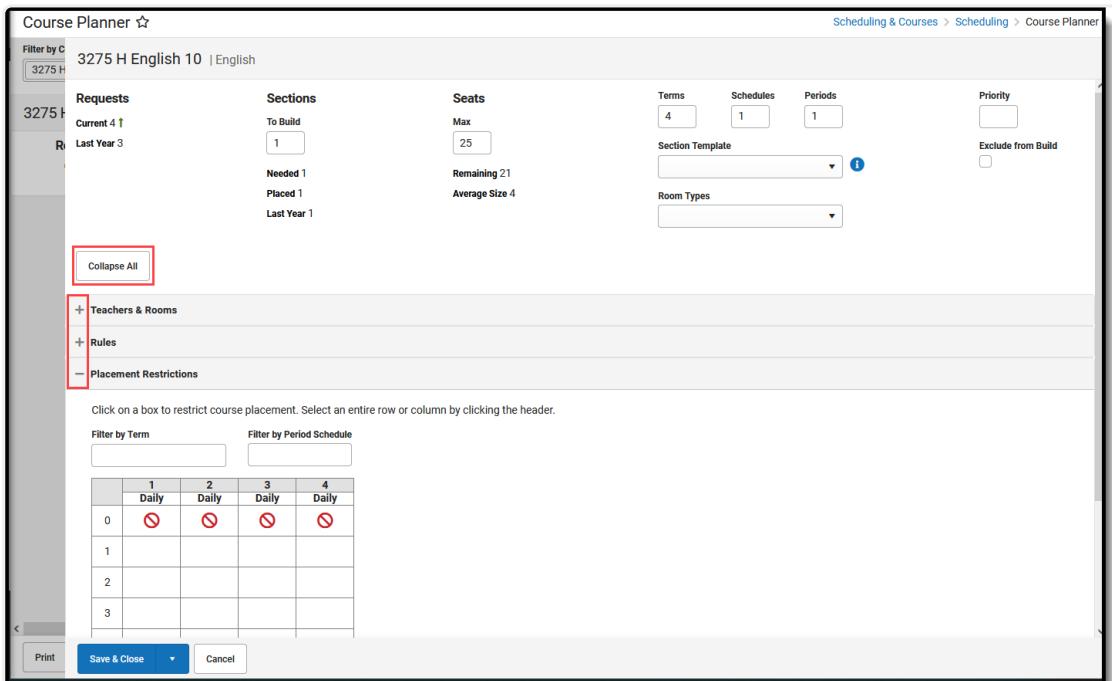
Course Planner Side Panel

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**.



The screenshot shows the Course Planner interface with the 'Teachers & Rooms' card expanded. The 'Collapse All' button is highlighted with a red box. The card displays sections, seats, and placement restrictions.

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**.

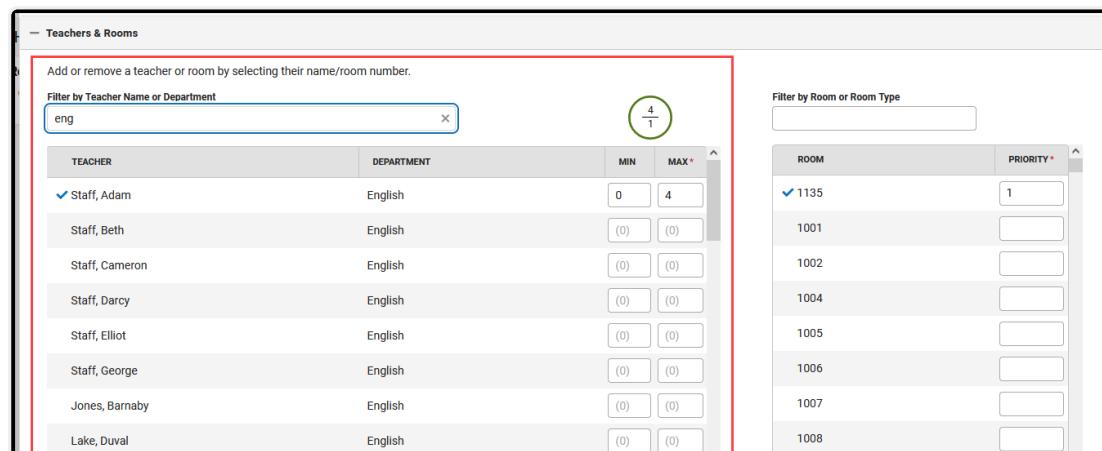
Teachers & Rooms

The Teachers & Rooms card lists all active teachers in the selected calendar and a list of AVAILABLE rooms displays. Both teachers and rooms can be narrowed to a smaller list 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.

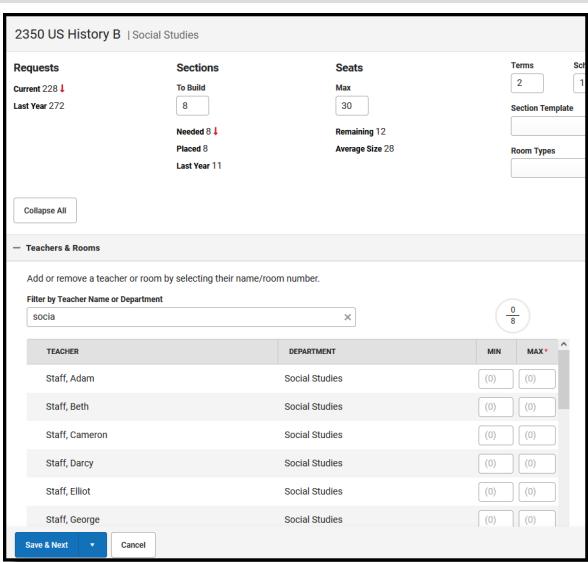
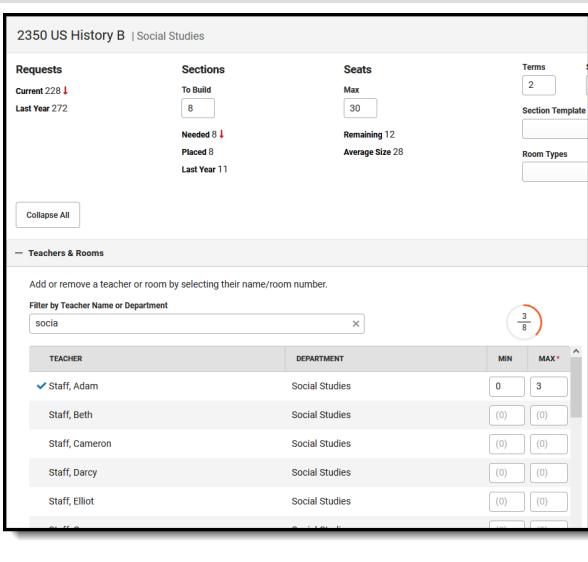


Assigning Teachers to a Course

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

The **Progress Dial** represents the total maximum 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

2350 US History B | Social Studies

Requests	Sections	Seats	Terms	Sch
Current 228 ↓	To Build 8	Max 30	2	1
Last Year 272				
Needed 8 ↓	Placed 8	Remaining 12	Average Size 28	
Last Year 11				

[Collapse All](#)

Teachers & Rooms

Add or remove a teacher or room by selecting their name/room number.

Filter by Teacher Name or Department

TEACHER	DEPARTMENT	MIN	MAX*
✓ Staff, Adam	Social Studies	0	3
✓ Staff, Beth	Social Studies	0	3
Staff, Cameron	Social Studies	(0)	(0)
Staff, Darcy	Social Studies	(0)	(0)
Staff, Elliot	Social Studies	(0)	(0)
Staff, George	Social Studies	(0)	(0)

[Save & Next](#) [Cancel](#)

One Assigned Teacher

2350 US History B | Social Studies

Needed 8 ↓	Placed 8	Remaining 12	Average Size 28	Room Types
Last Year 11				

[Collapse All](#)

Teachers & Rooms

Add or remove a teacher or room by selecting their name/room number.

Filter by Teacher Name or Department

TEACHER	DEPARTMENT	MIN	MAX*
✓ Staff, Adam	Social Studies	0	3
✓ Staff, Beth	Social Studies	0	3
✓ Staff, Cameron	Social Studies	0	3
Staff, Darcy	Social Studies	(0)	(0)
Staff, Elliot	Social Studies	(0)	(0)
Staff, George	Social Studies	(0)	(0)
Francis, Devin	Social Studies	(0)	(0)
Franklin, Spencer	Social Studies	(0)	(0)

[Save & Next](#) [Cancel](#)

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 selecting their name/room number.

Filter by Teacher Name or Department

TEACHER	DEPARTMENT	MIN	MAX*
✓ Staff, Adam	English	0	4
Staff, Beth	English	(0)	(0)
Staff, Cameron	English	(0)	(0)
Staff, Darcy	English	(0)	(0)
Staff, Elliot	English	(0)	(0)
Staff, George	English	(0)	(0)
Jones, Barnaby	English	(0)	(0)
Lake, Duval	English	(0)	(0)

Filter by Room or Room Type

ROOM	PRIORITY*
✓ 1135	1
1001	
1002	
1004	
1005	
1006	
1007	
1008	

Assigning Rooms to a Course

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

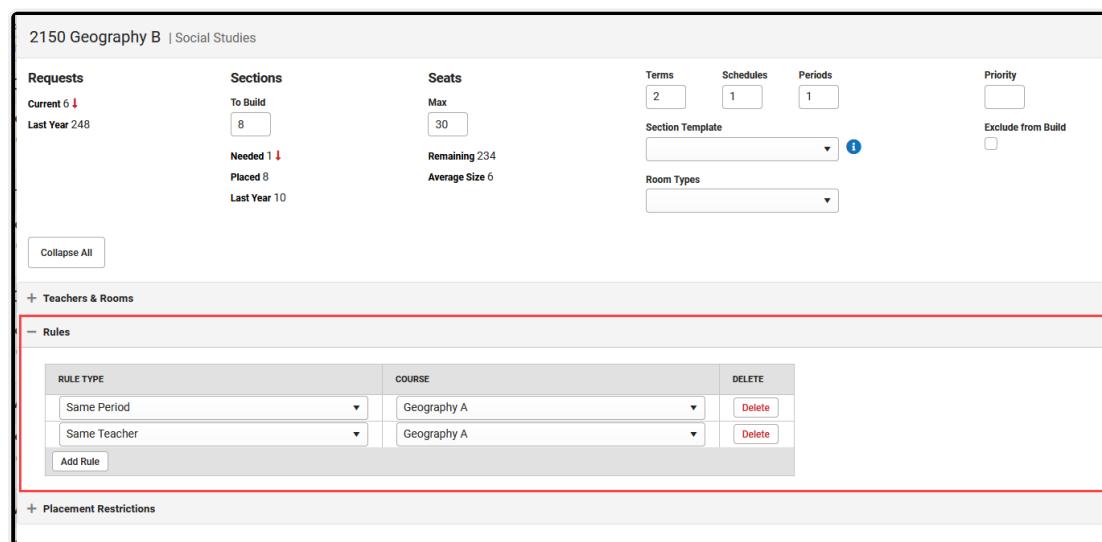
Course rules can be assigned to courses to assist with the planning and placement of courses across multiple years. When a rule is assigned to a course, its complementary rule is applied to the course's pair. For example, when Algebra I has a rule that is must be taken BEFORE Geometry, a rule is added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



The screenshot shows the 'Course Planner Rules' section for course 2150 Geography B. The 'Rules' section is highlighted with a red border. It contains a table with two rows of data:

RULE TYPE	COURSE	DELETE
Same Period	Geography A	<input type="button" value="Delete"/>
Same Teacher	Geography A	<input type="button" value="Delete"/>

Below the table are buttons for 'Add Rule' and 'Placement 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.

3950 Speech & Drama | English

[Collapse All](#)

+ Teachers & Rooms

+ Rules

- Placement Restrictions

Click on a box to restrict course placement. Select an entire row or column by clicking the header.

Filter by Term Filter by Period Schedule

	1 Daily	2 Daily	3 Daily	4 Daily
0	🚫	🚫	🚫	🚫
1				
2				
3				
4				
5				
6				
7				
ACT	🚫	🚫	🚫	🚫

Save & Close **Cancel**

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.

3725 World Literature English											PLACEMENT RESTRICTIONS		
Requests											Sections		
Current 62↑	Needed 2↑	To Build 2	Placed 2	Remaining Seats 8	Terms 2	Schedules 1	Periods 1	Priority	Max Seats 35	Teachers 1	Rooms 1	Rules 0	>
3750 Gothic Literature English											PLACEMENT RESTRICTIONS		
Requests											Sections		
Current 8↓	Needed 1↓	To Build 1	Placed 1	Remaining Seats 22	Terms 2	Schedules 1	Periods 1	Priority	Max Seats 30	Teachers 1	Rooms 1	Rules 1	>
3775 Mythology English											PLACEMENT RESTRICTIONS		
Requests											Sections		
Current 10↓	Needed 1↓	To Build 1	Placed 1	Remaining Seats 20	Terms 2	Schedules 1	Periods 1	Priority 0	Max Seats 30	Teachers 1	Rooms 1	Rules 1	>
3800 Journalism English											PLACEMENT RESTRICTIONS		
Requests											Sections		
											Courses		
											Constraints		

Placement Restriction Label

Modify Course Plan Information

[Change Sections, Seats, etc.](#) | [Assign Teachers to Courses](#) | [Assign Rooms to Courses](#) | [Assign Rules to Courses](#) | [Add Placement Restrictions](#) | [Previous and Next Course](#)

Change Sections, Seats, 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)
 - Seats (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.

The screenshot shows the Course Planner interface for course 3275 H English 10 English. The top navigation bar includes 'Scheduling & Courses > Scheduling > Course Planner'. The main area displays course details: Requests (Current 4, Last Year 3), Sections (To Build 1, Needed 1, Placed 1, Last Year 1), Seats (Max 25, Remaining 21, Average Size 4). Scheduling parameters are set to 4 Terms, 1 Schedule, 1 Period, with Priority and Exclude from Build checkboxes. Below these are Section Template and Room Types dropdowns. At the bottom are Print, Save & Close, and Cancel buttons. A tooltip 'Adjust Course Information' is visible at the bottom right.

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.
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.

To remove teachers from a course, click the blue checkmark next to their name.

Course Planner ★

3275 H English 10 | English

Requests

Current 4 | Last Year 3

Sections

To Build 2

Seats

Max 20

Remaining 36

Average Size 4

Terms

4 1 2

Schedules

Periods

Priority

1

Section Template

Room Types

Standard

Exclude from Build

Teachers & Rooms

Add or remove a teacher or room by selecting their name/room number.

Filter by Teacher Name or Department

TEACHER	DEPARTMENT	MN	MAX*
✓ Staff, Adam	English	0	3
Staff, Beth	Business/Career	(0)	(0)
Staff, Cameron	Business/Career	(0)	(0)
Staff, Darcy	Business/Career	(0)	(0)
Staff, Fiona	Business/Career	(0)	(0)
Staff, George	Business/Career	(0)	(0)

Filter by Room or Room Type

ROOM	PRIORITY*
✓ 1135	1
1001	
1002	
1004	
1005	
1006	

Assign Teachers to Courses

Print Save & Close Cancel

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.
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.

To remove rooms from a course, click the blue checkmark next to its name.

Course Planner 

3275 H English 10 | English

Requests

Current	1
Last Year	3

Sections

To Build	2
----------	---

Seats

Max	20
-----	----

Remaining 36

Average Size 4

Terms

4

Schedules

1

Periods

2

Priority

1

Section Template

Room Types

Standard

Exclude from Build

[Collapse All](#)

Teachers & Rooms

Add or remove a teacher or room by selecting their name/room number.

Filter by Teacher Name or Department

TEACHER	DEPARTMENT	MIN	MAX*
✓ Staff, Beth	Business/Career	0	3
✓ Staff, Cameron	Business/Career	0	3
✓ Staff, Darcy	Business/Career	0	3
✓ Staff, Adam	English	0	3
Carter, Leslie	Business/Career	(0)	(0)
Coles, Doyle	Business/Career	(0)	(0)

Filter by Room or Room Type

ROOM	PRIORITY*
1001	
1002	
1004	
1005	
1006	
1007	

[Print](#) [Save & Close](#) [Cancel](#)

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.
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.

To remove a rule, click **Delete**.

3950 Speech & Drama | English

Requests

Current 18 | Last Year 45

Sections

To Build 1

Max 30

Seats

Max 30

Remaining 12

Average Size 18

Terms 2

Schedules 1

Periods 1

Priority

Exclude from Build

Section Template

Room Types

Collapse All

+ Teachers & Rooms

- Rules

RULE TYPE	COURSE	DELETE
	There are no rules for this course. Click 'Add rule' to add a new rule.	

Add Rule

+ Placement Restrictions

Save & Close | Cancel | < Prev - 3900 Public Speaking

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.

3950 Speech & Drama | English

[Collapse All](#)[+ Teachers & Rooms](#)[+ Rules](#)[- Placement Restrictions](#)

Click on a box to restrict course placement. Select an entire row or column by clicking the header.

[Filter by Term](#)[Filter by Period Schedule](#)

I

	1	2	3	4
	Daily	Daily	Daily	Daily
0				
1				
2				
3				
4				
5				
6				
7				
ACT				

[Save & Close](#)[Cancel](#)[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.

2				
3				
4				
5				
6				
7				
ACT	🚫	🚫	🚫	🚫

Save & Next Cancel

◀ Prev - 3700 American & British Literature 3750 Gothic Literature - Next >

Previous and Next Courses

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.