Course Planner (Schedule Wizard)

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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.
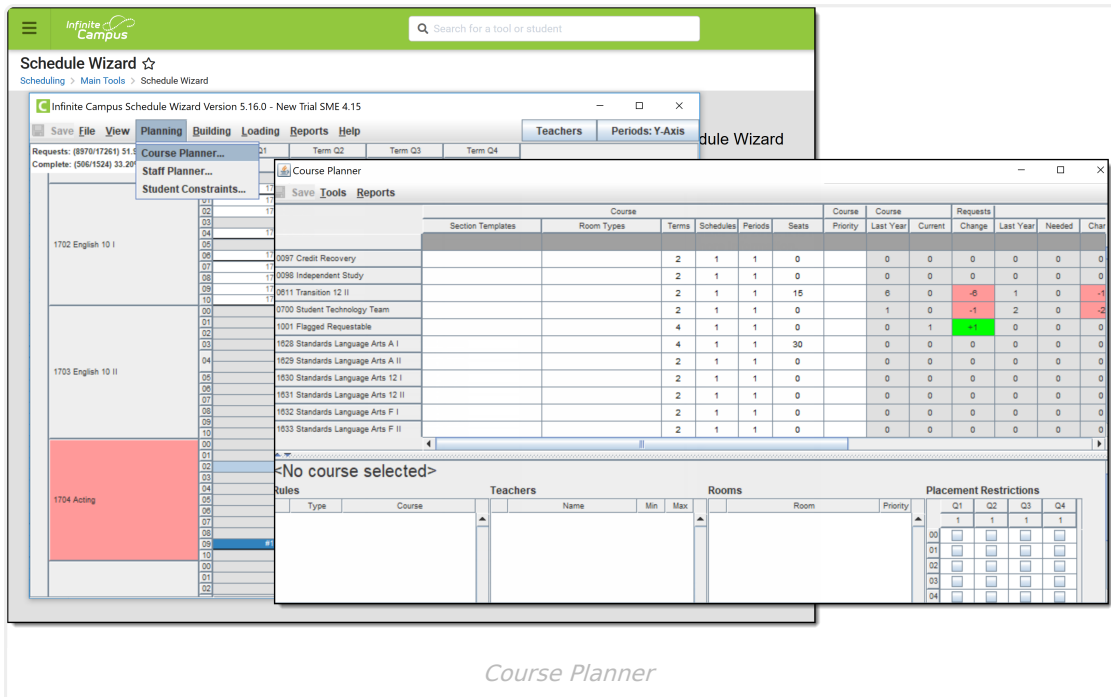
Course Planner

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 Layout

The Course Planner lists the names of courses (and departments, if selected) on the left hand side in alphabetical order. Then, the following information is listed for each course:

- Course data, entered on the Courses editor
- Section templates assigned to the Course
- Assigned Room Types
- Course Requests, entered during the Course Registration process and viewable in the Walk-In Scheduler

- Section information
- Course Constraint information

Any area on the Course Planner that is not grayed out is editable.

At the bottom of the Course Planner, scheduling rules can be added, teachers can be added to course sections and rooms can be scheduled for each course section.

In addition, placement restrictions can be selected. This limits where the course section is placed based on staff availability.

Course Details

The following defines the items listed for each column available for Courses on the Course Planner.

Item	Description
Section Templates	Indicates to which section template group the course is assigned. If this field is populated, the Terms, Schedules and Periods fields cannot be modified. If sections have already been placed, assigning a Section Template does not affect those sections. Any sections not already placed when building courses are affected.
Room Types	Describes the type of room (gymnasium, class room, auditorium, etc.) for the room name. District users are required to populate the options in the Attribute Dictionary that are available for selection. See the Room Types for more information.
Terms	Total number of terms a section of the course meets.
Schedules	Number of the total period schedules in which the course section meets.
Periods	Total number of periods a section of the course meets.
Seats	Total number of student seats for each course section. This field is limited to three characters.
Priority	Value for the priority this course takes in the Schedule Wizard loading process. If a value is entered in the Terms, Schedules, Periods, Seats or Sections to Build fields is not a numeric value, the value in this field changes to a zero.

Requests

The following defines the items listed for each column available for Requests on the Course Planner. This area lets the scheduling staff see how many new course sections they may need,

potentially causing new teachers to be hired.

Item	Description
Last Year	Total number of student requests (Required and Elected) for the course for the active school year. If scheduling is being done for the 2019-2020 school year, *Last Year* is the 2018-19 school year.
Current	Total number of requests (Required and Elected) for the course in the upcoming school year. If scheduling is being done for the 2019-2020 school year, *Current* is the requests for the 2019-20 school year.
Change	Difference between the active year's request total and the upcoming school year. If scheduling is being done for the 2019-2020 school year, *Change* is what is needed for the 2019-20 school year.

Sections

The following defines the items listed for each column available for Sections on the Course Planner.

Item	Description
Last Year	Number of sections built in the past school year for the course. For schools with multiple calendars in the previous year, the calendars must be numbered (System Administration > Calendar > Calendar > Calendar > Number) in order to properly report the Last Year value. See the Calendar Details article for more information.
Needed	Number of sections needed in the upcoming school year for the course.
Change	Difference between last year's section number and the upcoming year's section number.
To Build	Total number of sections that will be built for the course. If an existing value in this field is increased AFTER currently built sections have been locked, the new sections do not override the existing sections.
No Auto	If selected, the builder does not build the course. Sections of courses marked as No Auto need to be built manually.
Placed	Total number of sections placed.
Avg Size	Average size of each section (student count).
Remaining	Once everything is built and loaded, this total is the remaining number of seats available.

Constraints

The following defines the items listed for each column available for Sections on the Course Planner.

| Item	Description
Rules	Number of rules associated with the course.
Teachers	Teachers assigned to the course.
Rooms	Rooms assigned for the course.
Placement	Selection indicates a restriction exists for the placement of course sections.

Course Planner Tools

Mass Set Course Values | Mass Set Placement Restrictions | Replace/Append/Remove Constraints

The Course Planner contains tools to mass edit course restrictions. When a calendar has multiple schedule structures that have a varying number of course periods, the Course Planner removes any placement restrictions and displays the period schedules appropriately for each schedule structure.

Mass Set Course Values

The Mass Edit Course Values allows the setting of course information (e.g., terms, schedules and periods) for more than one course at a time. This tool is viewed like a query, where the user can select which items to set, enter the value of the change for the courses and select existing information to be overwritten.
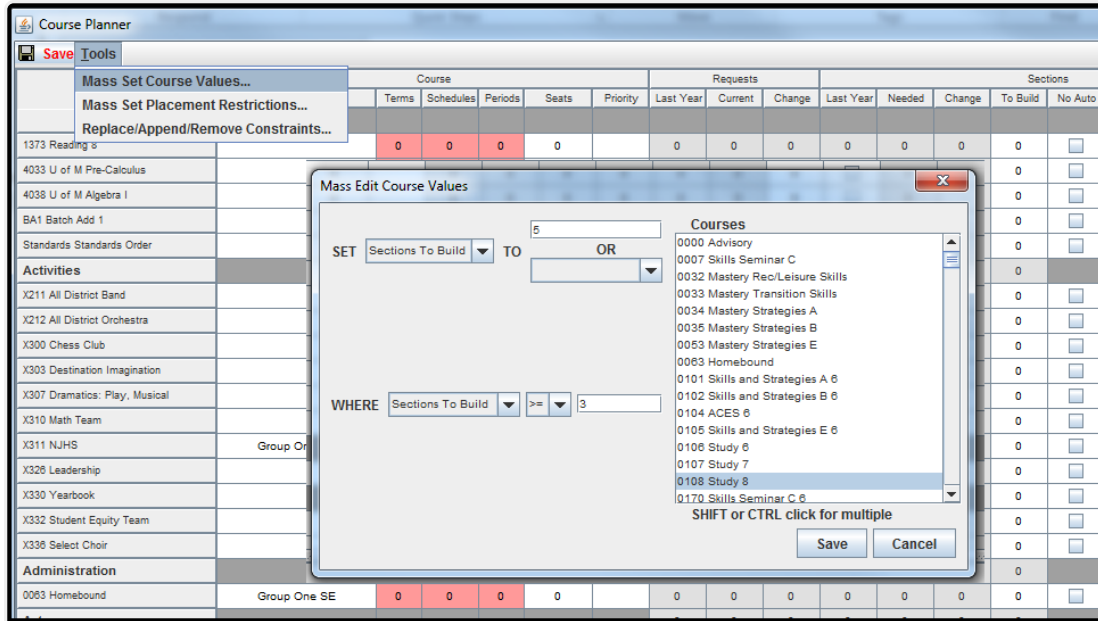
Course Planner Tools - Mass Set Course Values

Options for Mass Edit Course Values

The following tables define the options available for mass editing course values.

| Item	Options
SET	Terms Schedules Periods Seats Priority Sections to Build
TO	Terms Schedules Periods Seats Priority Sections to Build Last Year Sections Sections Needed Sections Placed

Item	Options
WHERE	Terms Schedules Periods Seats Priority Sections to Build Last Year Sections Sections Needed
OPERATOR	= (equals) > (greater than) < (less than) >= (greater than or equal to) <= (less than or equal to) != (does not equal)

Use the Mass Edit Course Values Tool

1. Select the option from the **SET** dropdown list for the courses that need to be modified.
2. Enter the **Value** in the blank field or select the **TO** option in the dropdown list.
3. Select the option from the **WHERE** dropdown list indicating what item should be changed.
4. Select the **Operator** from the dropdown list.
5. Select the **Courses** that should be modified.
6. Click the **Save** button on the tool. This updates the courses selected and highlight them in green.

Mass Set Placement Restrictions

The Mass Edit Placement Restrictions allows the selection of periods and terms where the selected courses **should not** be placed or built.
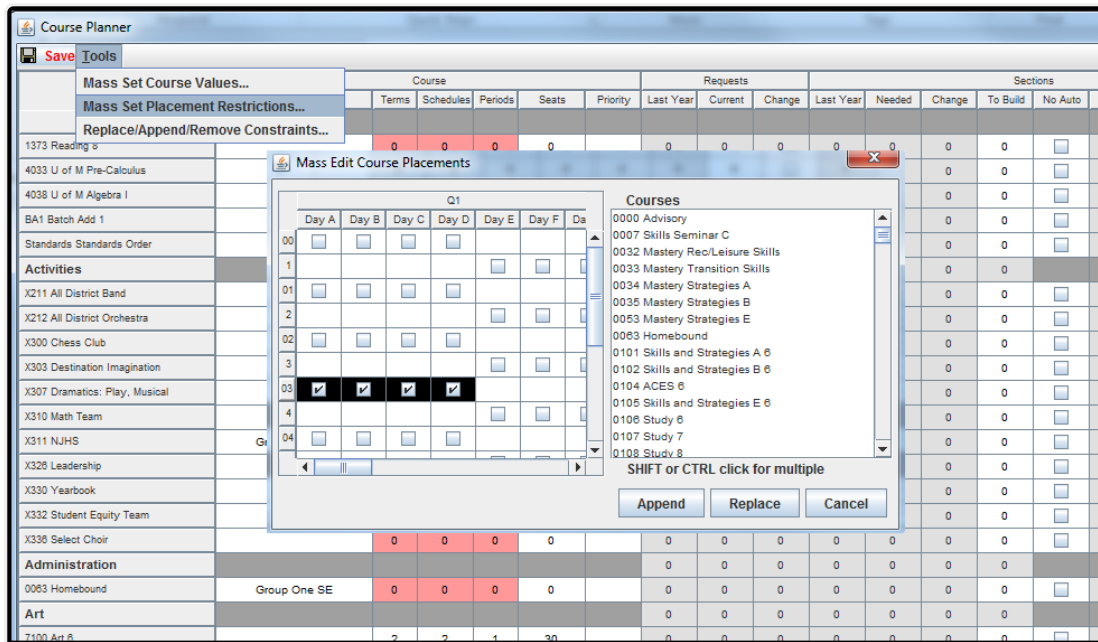
Course Planner Tools - Mass Placement Restrictions

Placement restrictions can be appended (added to) or replaced (overwritten). If adding additional restrictions to existing restrictions, click the **Append** button. If adding new or changing existing restrictions, use the **Replace** button.

> Existing restrictions do not display on this mass edit tool. Restrictions only display when the course is selected in the Course Planner.

Use the Mass Edit Course Placements tool

1. Select the **Courses** that should be modified.
2. Place a checkmark in the appropriate period and term combination where the course should not be placed.
3. Click the **Append** or **Replace** button as appropriate. Restrictions are updated.

Replace/Append/Remove Constraints

The Replace/Append/Remove Constraints tool is designed for use by districts that have never used constraints before in the scheduling process or have limited use of constraints. Information is built based on the previous year's course information. The district can use that same setup, replace the existing constraints, append the existing constraints or remove the constraints.

For example, if a teacher taught a class in a certain room last year, the tool looks at that course and assume that setup is an authorized constraint and build the teacher to room to course constraint.

For any existing placement restriction, room assignment or teacher assignment, the

Replace/Append/Remove Constraints tool can modify the existing information or the recently modified information. These items can be changes from last year's schedule, replaced from last year's schedule or deleted, allowing the user to plan course constraints from the beginning.
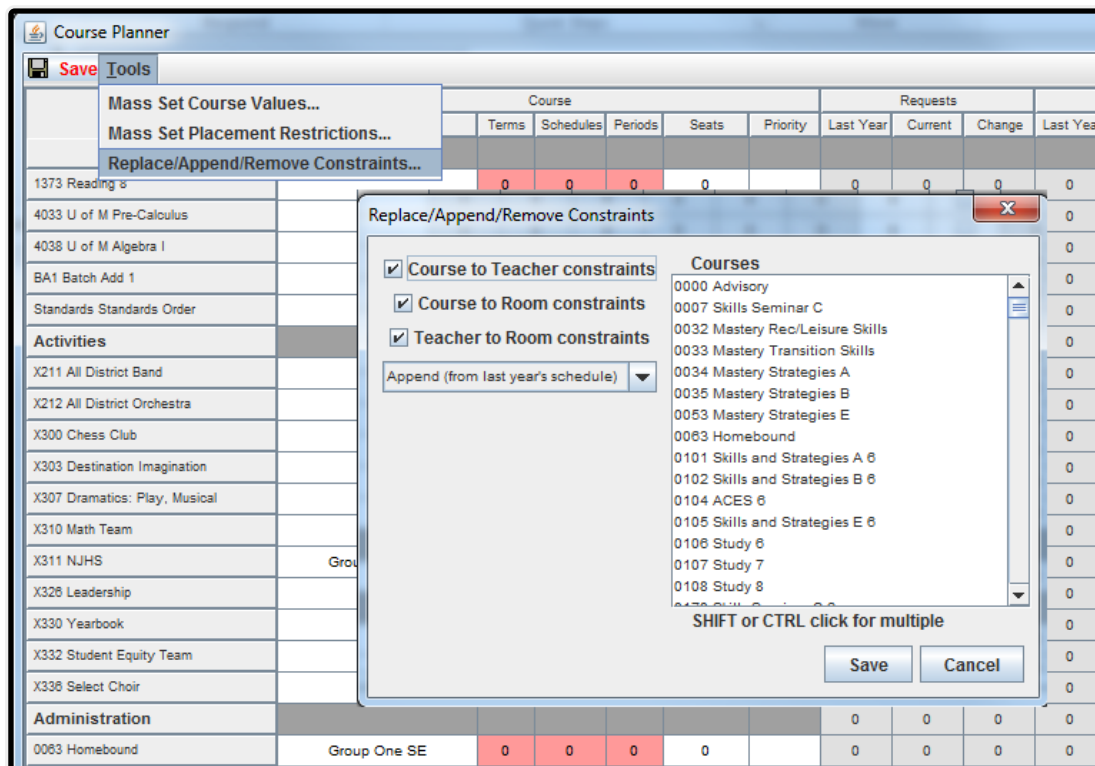
Course Planner Tools - Replace/Append/Remove Constraints

Course to Teacher constraints, Course to Room constraints and Teacher to Room Constraints are selected by default. If only a specific option should be modified, remove the checkbox from the unnecessary items.

The dropdown list selection determines what should happen to the constraints:

- Replace updates the existing constraint.
- Append changes the existing constraint.
- Remove completely removes the existing constraint.

Use the Replace/Append/Remove Constraints Tool

1. Select the desired constraints to remove.
2. Select the Action to perform from the dropdown list.
3. Select the **Courses** for which to remove the constraints.
4. Click the **Save** icon. Constraints for the selected courses are removed.

Add Course Planner Information

The Course Planner displays all constraints, rules, teacher assignments and placement restrictions in one place. Any rules, rooms or teachers already assigned to the courses display here.

Before adding this information, a course must be selected in the Course Planner. Do this by placing the cursor in any cell of the applicable course.

Save any changes made by clicking the **Save** icon at the top of the Course Planner. When changes have been made, this icon displays in red text.

If any Rules, Teachers, Rooms or Placement Restrictions need to be removed, select the item for removal and click the **X** next to the item. A warning message displays, asking the user if this is the desired behavior. Click the **Delete** button to continue with the removal.

Rules

See the Course Rules article for descriptions of each rule.

1. Place the cursor in one of the course fields to display course editors at the bottom of the page.
2. Click the **Add New** button at the bottom of the Rules editor. A blank row displays.
3. Click in the **Course** field. This acts as a dropdown list.
4. Select the course for the rule.
5. Click in the **Type** field. This acts as a dropdown list.
6. Select the desired **Rule** to apply to the course selected above and to place a restriction on the selected course in the dropdown list.

If a scheduling rule needs to be removed from a course, it removes it from both the selected course and the course to which the rule applies.

Using a combination of rules or multiple rules limits the placement of sections on the Whiteboard and limit the fulfillment of student requests. Only add rules when absolutely necessary.

Course Planner - Add Scheduling Rules

Teachers

Assigned teachers display on the Section tab and are added to sections outside of the Wizard on the Staff History tab.

1. Click the **Add New** button at the bottom of the Teachers editor. A blank row displays.
2. Click in the **Name** field. This acts as a dropdown list.
3. Select the teacher to assign to this course.
4. Modify the Minimum and Maximum sections that can be taught by that teacher.

		Course				
	Section Templates	Terms	Schedules	Periods	Seats	Priority
1373 Reading 8		0	0	0	0	
4033 U of M Pre-Calculus		0	0	0	0	
4038 U of M Algebra I		0	0	0	0	
BA1 Batch Add 1		0	0	0	0	
Standards Standards Order		0	0	0	0	
Activities						
X211 All District Band		0	0	0	0	
X212 All District Orchestra		0	0	0	0	
X300 Chess Club		0	0	0	0	
X303 Destination Imagination		0	0	0	0	
X307 Dramatics: Play, Musical		0	0	0	0	
X310 Math Team		0	0	0	0	
X311 NJHS	Group One SE	0	0	0	0	
X326 Leadership		0	0	0	0	
X330 Yearbook		0	0	0	0	
X332 Student Equity Team		0	0	0	0	
X336 Select Choir		0	0	0	0	
Administration						
0063 Homebound	Group One SE	0	0	0	0	
Art						
7100 Art 6		2	2	1	30	

1373 Reading 8

Rules   **Teachers**   **Room**

	Type	Course			Name		Min	Max	
X	sameperiod	8371 Spanish 8 - B	▲	X	Adams, Lauren	▼	0	3	▲
X	sameperiod	8371 Spanish 8 - B			, Lauren	▲			
X					, John	☰			
					, Katie				
					Al				
					, Carmen				
					Bruce				
					, Chantell				
					, Michael	▼			

Course Planner - Adding Teachers

Rooms

Rooms are assigned on the Sections tab. Rooms assigned a Room Type are listed first.

1. Click the **Add New** button at the bottom of the Rooms editor. A blank row displays.
2. Click in the **Room** field. This acts as a dropdown list.
3. Select the room to assign to this course.

		Course					Requests			
	Section Templates	Terms	Schedules	Periods	Seats	Priority	Last Year	Current	Change	Last
1373 Reading 8		0	0	0	0		0	0	0	
4033 U of M Pre-Calculus		0	0	0	0		0	0	0	
4038 U of M Algebra I		0	0	0	0		0	0	0	
BA1 Batch Add 1		0	0	0	0		0	0	0	
Standards Standards Order		0	0	0	0		0	0	0	
Activities							0	0	0	
X211 All District Band		0	0	0	0		0	0	0	
X212 All District Orchestra		0	0	0	0		0	0	0	
X300 Chess Club		0	0	0	0		0	0	0	
X303 Destination Imagination		0	0	0	0		0	0	0	
X307 Dramatics: Play, Musical		0	0	0	0		0	0	0	
X310 Math Team		0	0	0	0		0	0	0	
X311 NJHS	Group One SE	0	0	0	0		0	0	0	
X326 Leadership		0	0	0	0		0	0	0	
X330 Yearbook		0	0	0	0		0	0	0	
X332 Student Equity Team		0	0	0	0		0	0	0	
X336 Select Choir		0	0	0	0		0	0	0	
Administration							0	0	0	
0063 Homebound	Group One SE	0	0	0	0		0	0	0	
Art							0	0	0	
7100 Art 6		2	2	1	30		0	0	0	

1373 Reading 8

Rules | **Teachers** | **Rooms**

Type	Course		Name	Min	Max		Room	Pric
sameperiod	8371 Spanish 8 - B						0036	1
sameperiod	8371 Spanish 8 - B						0036	
							0037	
							0038	
							0039	
							0040	
							0041	
							0042	
							0043	

Course Planner - Adding Rooms

When selecting a room for a placed Section, the logic in the build process of the Schedule Wizard follows this order:

1. Selects the Room from Staff Planner, if Rooms are designated in both Course Planner and Staff Planner and the Room for the Section to Build appears in both Planners.
2. Selects the Room from Course Planner, if Rooms are designated in both Course Planner and Staff Planner and the Room for the Section to Build appears only in the Course Planner.
3. Selects the Room from Course Planner, if Rooms are designated in only the Course Planner.
4. Selects the Room from Staff Planner, if Rooms are designated in only the Staff Planner.
5. If Rooms are not designated in either Planner, a room is not automatically assigned for the section.

Placement Restrictions

Place a checkmark in the appropriate period and term combination. These checkboxes indicate where the sections of the course **will not be placed** on the Wizard when course information is loaded. This restriction is different than the Placement Restrictions assigned to staff when using the Staff Planner. Course Placement Restrictions determine when a course **will not meet**. For example, if band has to meet in Period 7 for the entire school year, checkmarks should be placed in all periods and terms except Period 7. Or, to eliminate the placement of courses over the lunch period, select that period for each term.

Course Planner - Placement Restrictions

Automatic placement restrictions occur when the Before and After scheduling rule is in place and a certain percentage of the requesting students have requests for both courses. For example, German 1 has a rule of before German 2; German 2 has a rule of After German 1.

German 1 has 10 requests, but only 5 of those students also have a request for German 2; the placement constraint will not be added for German 1 because not more than 50% of those students have requests for the other course. If 6 of the 10 students who have a German 1 request also have a German 2 request, the placement constraint is added.

Course Planner Reports

To generate the current layout of courses for the selected trial, use the **Save Course Planner Display** to save the layout to the location of your choosing, in CSV or HTML. When one of these options is selected, follow the instructions for saving a report to your computer or other shared location. Selecting the **Current View** saves the course layout as it is currently displayed.

Course Planner Reports

Next Steps

- Review the Checklist for Scheduling and Other Scheduling Tools documentation.
- Use the Staff Planner to enter requirements for each staff based on their licensure, desired room information and courses each staff person can teach.
- Build the Schedule using the Building Tools.
- Load course requests using the Loading Tools.
- Generate Reports to review the placement of courses.
- If all scheduling items have been completed and any additional changes will be made in the Campus application, mark the Trial active.