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Overview

The Scheduling: Course Setup Guide provides a basic overview of eSchoolData’s process for managing courses. The eSD® Course Catalog is organized by School and Scheduling Year, maintaining accurate records of prior years’ courses while allowing updates to existing courses and creation of new courses for current and future years.

Courses

Go to Scheduling > Courses > Courses. Select the School and Scheduling Year (defaults to current year) to view the existing courses (Course Catalog).

Course Catalogs can be filtered by number, name, priority, subject or department using the Criteria drop-down menu. Users can filter the course catalog for staff members assigned as a teacher of record using the Staff drop-down menu.

Existing courses can be Viewed, Edited or Deleted. Click the View Classes icon to open the Course Classes page for the selected Scheduling Year. Click New to create a new course for the selected Scheduling Year.

The Courses list can also be exported to Excel. The Excel file can be merged into a Word document to begin a Course Catalog for distribution to students and/or online posting.

Course Setup Items

eSchoolData has grouped a number of Course Setup Items together: Class Link Code, Course Levels, Course Link Code, Course Type, Credits, Drop Class Reasons, and Location Restriction. These Setup Items need to be defined before they can be applied to Courses.

Note:

The material presented in this guide assumes the user has a basic familiarity with the eSD® System.

For information on how to access and navigate the system, and select basic user preferences, please refer to the Getting Started User Guide.

Note:

The Course Description field has a limit of 1000 characters. When creating a Course Catalog for distribution, schools may need to add to the data in that field.

Note:

Courses associated to student records cannot be deleted, as indicated by the grey Delete icon.

Note:

Course Levels can be defined at the district level and will display at the building level, but cannot be edited or deleted at the building level (icons are hidden).
Go to **System > Scheduling > Course** to define these items. Select the applicable **Scheduling Year**, then select the **Course Menu Item** to be defined. Users can View, Edit, and Delete existing Course Menu Items, and create New Course Menu Items.

Certain Course Menu Items that have been pre-loaded by eSD® cannot be edited or deleted, and will display grey Edit and Delete icons. In addition, Course Menu Items that have been associated to Courses in the selected Scheduling Year cannot be deleted, and will display a grey Delete icon.

See below for descriptions of each Course Menu Item category.

### Class Link Code

Class Link Codes (Building Level setting) are used to tie a section (class) of one course to a section (class) of another course when using the eSchoolData Sectioner. The scheduling engine will place students into sections with matching links, or into unlinked sections of each course, based on availability in the student’s schedule. Class Links are applied when defining the class sections.

Enter the Code and the Display name, then click Save.
Course Levels

Course Levels (District Level and Building Level settings) define different degrees of difficulty (Honors, Advanced Placement, etc.) for courses. Course Levels can be used to assign course weights or add-on points in eSchoolData’s Grade Reporting Module. Course Levels are applied when defining the course.

For district-level Course Levels, enter the Code, the State Code (if applicable) and the Level Name. Enter the number of Weighted Addon points, and the minimum Score at which those points should be applied, then select the grading calculations (Class Rank, MP Total, Honor Roll) in which the Weighted Addon points should be used. Enter a Description (optional) and the Course Level to be used for Unweighted Calculations (leave at Select for no level). When finished, click Save to all buildings.

For building-level Course Levels, enter the Code, the State Code (if applicable) and the Level Name. Enter the number of Weighted Addon points, and the minimum Score at which those points should be applied, then select the grading calculations (Class Rank, MP Total, Honor Roll) in which the Weighted Addon points should be used. Enter a Description (optional) and the Course Level to be used for Unweighted Calculations (leave at Select for no level). When finished, click Save.

Note: Course Levels defined at the district level cannot be edited or deleted at the building level (icons are hidden).
Course Link Code

Course Links (Building Level setting) are used to tie one course to another course when using the eSchoolData Sectioner. The scheduling engine will place students into sections for each linked course based on availability in the student’s schedule. Course Links are applied when defining the course.

Enter the Code and the Display name, then click Save.

Course Type

Course Type (Building Level setting) defines categories of courses, typically by length (full year, half year, trimester, etc.) and whether the course is graded (marks/no marks). Course Types can be used to filter information when generating course reports in eSchoolData. In addition, Course Types are used to identify courses when creating Attendance Letter Jobs, generating sections using the Study Hall Wizard and using Placeholder Courses. Course Types are applied when defining the course.

Enter the Course Type, then click Save.

Note:
Courses to be included in PIMS Reporting must be identified by a hyphenated Course Type. Example:
- FY-Full Year
- S1-Semester 1
- S2-Semester 2.

Non reportable courses can have Course Types without a hyphen (-). Example:
- Full Year
- Half Year
- Quarter Year

Note:
The Placeholder and Study Hall Course Types are used by other parts of the eSD® system, and should NOT be deleted.
Credits
Users must define the number of Credits (Building Level setting) that can be earned upon course completion. Credits are applied when defining the course.

Enter the number of Credits and the Description, then click Save.

Drop Class Reasons
Drop Class Reasons (Building Level setting) define the reasons why a class would be dropped from a student’s schedule. Drop Class Reasons are applied when students’ schedules are changed.

Enter the Code and the Reason, then click Save.

Note:
Credits can be extended to a max of 2 decimal places.

Note:
Drop Class Reasons are not needed for Course setup, but will be needed for student schedule changes.
Location Restriction

Location Restrictions (Building Level setting) allow users to create teams by applying the same location restriction to multiple course sections and multiple students. The scheduling engine will place students into sections for each course based on the location specified for the student and the section. Location Restrictions are applied when defining the course sections, and also applied to students’ Profiles.

Enter the Code and the Display name, then click Save.

New Course

Go to Scheduling > Courses > Courses. Select the School and Scheduling Year (defaults to current year), then click New to create a new Course.
From the New Course screen, enter all course information using the available fields. Fields denoted with an * are required before a record can be saved. When finished, click Save. For a complete explanation and glossary of Required Fields, Optional Fields, and Course Options, please see below.

**Required Fields:**

**Course Number:** Each course (and mini course) must have a unique course number and cannot contain a leading zero. Course Numbers are alpha/numeric and can be up to eight (8) characters in length.

**Average Seats:** A course’s average seats will become the default entry in the maximum seats field in newly created sections. Users will have the ability to modify this number on a section-by-section basis. The average seats can be up to four (4) characters in length.

**Course Type:** Course Types denote categories of courses, typically by length and whether the course is graded, and can be used to filter information when generating course reports in eSchoolData. In addition, course types are used to identify courses when creating Attendance Letter Jobs, generating sections using the Study Hall Wizard, using Placeholder courses and defining Parent/Student Portal Course Request Entry options. Course Types are created from System > Scheduling > Course.

**Course Name:** This field serves as the internal label for the course, and it will be viewable to district staff members only. The field has a limit of 90 characters.

**Display Name:** This field serves as the external label for the course, and it will appear on all correspondence and reports.

**Note:**
Courses to be included in PIMS Reporting must be identified by a hyphenated Course Type. **Example:**
- FY-Full Year
- S1-Semester 1
- S2-Semester 2.

Non reportable courses can have Course Types without a hyphen (-). **Example:**
- Full Year
- Half Year
- Quarter Year

**Note:**
It is important that all of the course fields and course options are set correctly, as these settings will impact scheduling, attendance, report cards, transcripts, honor roll, etc. Please refer to the User Guides specific to each of these topics to verify all entries are correct.
**Priority:** This field serves as the default priority for all student requests created for the course. The eSchoolData Sectioner will use priority to determine the order students will be placed into classes. Required requests are fulfilled first, elective requests are fulfilled second, and optional requests are fulfilled last. Priority is also a factor in certain Scheduling Reports.

**Core:** This field allows districts to differentiate between required and core courses.

**Credits:** Indicates the number of credits that can be earned upon course completion. Credits are created from System > Scheduling > Course.

**Department:** Courses must be associated to a department. A course’s department will be used to match staff members to sections when the eSchoolData Builder is used.

**EOY Credit:** This field is a factor in End of Year calculations, and is typically used in a Middle School. If no EOY Credit is entered for a course, the End of Year calculations will use the Credits value. EOY Credit does not replace the Credits in Grade Reporting calculations.

**Seat Time:** A value between 0 and 99.99 must be entered for informational purposes. This field does not have any effect on scheduling.

**PCM 1, PCM 2:** Partial Credit Multipliers are used for weighting courses that are in progress.

**Fees:** Indicates any fees associated with the course.

**Link Code:** Link Codes allow users to create course links by applying the same course link to multiple courses. Course Links are created from System > Scheduling > Course.

**Grade Group:** Grade Groups allow schools to define separate sets of allowable grades for different groups or types of courses. A course can be associated to only one Grade Group.

**Grade Restriction:** This field allows users to restrict by grade level the students who are being scheduled into the course. Leave blank for no restrictions, or select the grade(s) that will be allowed to take the course.

*Exception:* When the **Course Type** is Study Hall, ALL grades in the Grade Restriction field are automatically selected, because Grade Restrictions are required for the Study Hall Wizard. Users can narrow the selection if desired.

**Subject:** Courses must be associated to a subject. A course’s chosen subject can drive other features within eSchoolData, including the Teacher Interface and Mass Course Request tools.

**Optional Fields:**

- **Description, NCES Course #:** Serve as optional, reference fields.

- **Course Prerequisites:** Narrative description of course prerequisites, displays on Parent/Student Portals. Also displays when defining Course Request Pre-Requisites (see page 22).

- **Course Level:** Course Levels denote degrees of difficulty for a course, and can be used to assign course weights or add-on points in eSchoolData’s Grade Reporting Module. Course Levels are also used in the Grade Conversion Table for Alpha Grade and/or GPA conversions. Course Levels are created from System > Scheduling > Course.

- **State Course #:** Needed for the course to be included in the state reporting extracts.

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**Note:**
When EOY Credit is used, course Credits are often 0 and EOY Credit is 1.

**Note:**
For more information regarding Partial Credit Multipliers, please refer to the Grade Reporting User Guide.

**Note:**
For more information on Course Links, see page 49.

**Note:**
Grade Restrictions, when applied, also limit course availability for Parent/Student Portal Course Requests.

**Note:**
The Description field has a limit of 1000 characters.

**Note:**
For more information on the Grade Conversion Table, see the Grades Setup User Guide.
**Curriculum:** Curriculum defines which set(s) of Learning Standards are available for association with teachers’ Connect Gradebook assignments. A course can be associated to only one Curriculum. Curriculum are created from **System > Scheduling > Curriculum**.

**College Credit:** Informational only, number of college credits students enrolled for college credit can earn (default: 0).

**Typed Comments:** This setting controls a teacher’s ability to enter free-text comments on Progress Reports and Report Cards.

**Selected Comments:** This setting controls the number of selected or “canned” comments teachers can enter for Progress Reports, Report Cards, Elementary Report Cards and/or Standards-Based Progress Reports/Report Cards. Comments are created from **System > Grade Reporting > Comments**, and flagged for the applicable grade reports.

**Progress Report Grade Entry:** This option will enable teachers to display students’ cumulative grades on progress reports.

**Allow Alpha Grade Conversion:** The eSchoolData system can convert students’ grades on progress reports and report cards to alpha grades when this option is selected in conjunction with the print alpha grades option for progress reports and report cards. This setting does NOT affect Transcript display.

**Display Weighted Assignment Average:** This option controls the availability of the Weighted Assignment Average column in the Teacher Connect Progress Report Entry screen.

**Course Options:**

**Gifted:** Checking this box will apply the gifted designation to the course for state reporting purposes.

**No Marks:** Checking this box disables grade entry for any classes for the course. A teacher will not be able to enter Marking Period grades for the course. The course will not show on the Marking Period Summary report.

**Yearly Averages:** Checking this box will include grades for the course in yearly averages and cumulative average calculations on transcripts.

**Class Ranks:** Checking this box will include grades for the course in class rank calculations.

**Marking Period Totals:** Checking this box will include the course when running the Marking Period Totals and generating MP Averages.

**Transcripts:** Checking this box will display the course on transcripts.

**Honor Rolls:** Checking this box will include the course in honor roll calculations.

**National Honor Society:** Informational only, allows users to designate courses to be reviewed for NHS candidacy.

**Attendance:** Checking this box will allow users to take attendance for the course.

**PRC (Permanent Record Card):** Checking this box will display the course on the PRCs in eSD® (This does not correspond to the PRCs from Access).
**Offered Course:** Checking this box will include the course in all reports and enable users to enter course requests. Leaving the box blank will prevent users from entering student requests for the course.

**Print on Matrix:** Checking this box will print the course on matrix reports, including the Potential Conflict Matrix and Matrix Schedules.

**Print on Schedule:** Checking this box will display the course on a student’s schedule.

**Junior Honor Society:** Informational only, allows users to designate courses to be reviewed for JHS candidacy.

**Midterm:** Checking this box will allow users to include a Midterm grade in the teacher gradebook as well as including the course in the Marking Period Grade Search Report when filtering for midterm grades.

**Final Exam:** Checking this box will allow users to include a Final Exam grade in the teacher gradebook as well as including the course in the Marking Period Grade Search Report when filtering for final exam grades.

**Honors:** Check to indicate Advanced Academic courses, and allows users to confirm that the applicable state codes are assigned.

**Advanced Placement:** Check to indicate that a course can make a student eligible for Advanced Placement credits at a post-secondary institution, and allows users to confirm that the applicable state codes are assigned.

**Career and Technical:** Checking this box will apply the career and technical designation to the course, and allows users to confirm that the applicable state codes are assigned.

**International Baccalaureate:** Check to indicate that a course is part of an International Baccalaureate Program, and allows users to confirm that the applicable state codes are assigned.

**College Course:** Informational only, selecting this course option will NOT report as ‘Y’ for Dual Credit within state reporting. To report a ‘Y’ in the field, an appropriate College/High School Credit (Dual Enrollment) Course Code must be entered in the State Course # field on the Course record.

**Credit Recovery:** Informational only, allows users to designate courses used for credit recovery.

**Summer School:** Informational only, allows users to designate courses to be used for Summer School.

**Required for Graduation:** Check to indicate that a course is a graduation requirement for all students.

**Online Course:** Check to indicate that a course is an Online Course.

**Business:** Check to indicate the method used to deliver this course is a Business.

**Community Facility:** Check to indicate the method used to deliver this course is a Community Facility.

**Home:** Check to indicate the method used to deliver this course is Home.

**Hospital:** Check to indicate the method used to deliver this course is a Hospital.

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Important:
* Indicates the course option is used for PIMS reporting.

Please see SIS - PIMS Course and Grades Domain with Staff Student Subtest Learning Guide for detailed PIMS descriptions and mapping.
*In School*: Check to indicate the method used to deliver this course is In School.

*Library/Media Center*: Check to indicate the method used to deliver this course is a Library/Media Center.

*Other K-12 Educational Institution*: Check to indicate the method used to deliver this course is an Other K-12 Educational Institution.

*Post-secondary Facility*: Check to indicate the method used to deliver this course is a Postsecondary Facility.

*Other*: Check to indicate the method used to deliver this course is an Other.

*Blended/Hybrid*: Check to indicate the method used to deliver this course is a Blended/Hybrid.

From the Courses screen, users can create a course directory for the present year as well as previous years, including course descriptions and prerequisites. Click the Excel icon to open an Excel spreadsheet.
The course data on the spreadsheet can be sorted by department, course number, course name, etc. Once the information and layout have been customized, users can create a course offering booklet from the Excel file.

Tip: Merge the data from the Excel file into Word (or another word processor) to create a Course Offering Booklet for distribution to students.

Note: The Course Description field has a limit of 1000 characters.

When creating a Course Catalog for distribution, schools may need to add to the data from that field.

Edit Course

Go to Scheduling > Courses > Courses. Course catalogs can be filtered by number, name, priority, subject or department using the Criteria drop-down menu. Users can filter the course catalog for staff members assigned as a teacher of record using the Staff drop-down menu.

Existing courses will populate in the Courses list, and can be Viewed, Edited, or Deleted using the corresponding icons. Click the Edit icon to open the Edit Course window.
From the Edit Course screen, make any necessary changes. All fields with a red asterisk * are required in order to save changes. When finished, click Save. For a complete explanation and glossary of Required Fields, Optional Fields, and Course Options, please see pages 9-13.

View Course Details

Go to Scheduling > Courses > Courses. Course catalogs can be filtered by number, name, priority, subject or department using the Criteria drop-down menu. Users can filter the course catalog for staff members assigned as a teacher of record using the Staff drop-down menu.

Existing courses will populate in the Courses list, and can be Viewed, Edited, or Deleted using the corresponding icons. Click the View icon to open the Course Details screen.
The **Course Details** screen defaults to showing the **Required Fields**. Click the Expand icons ✦ to view the **Optional Fields** and **Course Options**.

The buttons along the top allow users to view **Requested Students**, **Assessments**, **Resource Classes**, **Classes**, **Course Weights**, **Average Formulas** and **Pre-Requisites** associated to the **Course**.

**Requested Students** returns a list of students who have Course Requests for the selected **Course** in the selected **Scheduling Year**.

**Assessments** returns a list of Assessments associated to the selected **Course** in the selected **Scheduling Year**. For more information, see the **Assessments User Guide**.
Resource Class returns a list of Resource Class sections for the selected Course in the selected Scheduling Year. For more information, see New Resource Class on page 29.

Class returns a list of Class sections for the selected Course in the selected Scheduling Year. For more information, see New Class on page 26.
Course Weights returns the Course, Marking Period, and Assessment Weights associated to the selected Course in the selected Scheduling Year. For more information, see the Grade Reporting Setup User Guide.

Average Formulas returns the Semester and Final Average Formulas (if any) associated to the selected Course in the selected Scheduling Year. For more information, see the Grade Reporting Setup User Guide.
The Course Request Pre-Requisite screen returns the Pre-Requisite Narrative defined in the Course Settings and the Pre-Requisite Rules (if any) defined for the Course. For more information, see Course Request Pre-Requisites on page 22.

Course Weights Report

At the school level, go to Academic > Course Weights to view course settings in table format for the selected Scheduling Year (defaults to current year). The course settings also include the Course Priority, Pre-Requisite Narrative, and Pre-Requisite Rules (when defined).

Users can View and/or Edit individual courses, and export the course settings to Excel.
Scroll to the right to export the course settings to Excel.

Important:
The Excel export includes columns for each Semester Average and the Final Average. Course-level formulas will be displayed as applicable; School-level formulas (when defined) will be displayed for all other courses.

Formulas defined for each grade level are included in the applicable columns, separated by semicolons.

When Use Summation is selected, the formula does NOT include the “ / n” (where n is the sum of the factors).

Mass Course Update

Go to System > Scheduling > Mass Course Update. Once the course catalog has been created, courses can be updated en masse using the Mass Course Update tool.

From the Select Courses tab, select the scheduling year for which courses should be updated. Use the available filtering fields and click Search to generate the Available Courses list. Double-click the desired courses to copy them to the Selected Courses list, or use the Move All buttons to move all Available Courses to the Selected Courses list. When finished, click Next.
From the **Mass Course Fields** tab, users can tag information to be updated by clicking the red checkmark icon ✚ next to select fields. Only fields with a green checkmark icon ✔ will be updated during the mass course update process. When finished selecting fields and entering the new course information, click **Next**.

From the **Update Fields** tab, users can review the information that will be updated. Click **Back** to disable an included field, or change the value being updated. When finished, click **Update** to complete the process. To return to the **Select Courses** tab, click **Start Over**.

**Note:**
When the red checkmark icon ✚ is clicked, it turns to a green checkmark ✔, and the greyed-out menu field opens to allow editing of the tagged information.
Course Request Pre-Requisites

Go to Scheduling > Courses > Courses. Once a course has been added to the catalog, users can define the Course Request Pre-Requisite Rules. On the Courses screen, click the View icon next to a course to open the Course Details screen.

From the Course Details screen, click Pre-Requisites to open the Course Request Pre-Requisite screen.

The Course Request Pre-Requisite screen displays the Pre-Requisite Narrative defined in the Course Settings and allows users to define Pre-Requisite Rules that the system will use to determine if the prerequisites have been met. Click the Add icon at the right end of the View Rule Segments header row to add a Rule Segment.

Note:
During School Setup, Course Pre-Requisites associated to Courses from the selected School Year will copy forward.

Note:
To edit the Pre-Requisite Narrative, edit the Course Prerequisites field in the course itself (Scheduling > Courses > Courses > Edit).
The screen refreshes to display the components for the new Rule Segment.

Select the **Source** category to display the available Source options in that category, then select the applicable option. Select the applicable **Source Operator**.

Next define the applicable condition for the selected option (both **Where** fields), then click **Save** to save the Rule Segment.

**Note:** Conditions needed to build the Rule Segment will vary, based on the selected **Source**.
Users can **Edit** or **Delete** the defined Rule Segment, and **Add** additional Rule Segments as needed.

When defining additional Rule Segments, select the **Connecting Operator** (AND, OR), then build the Rule.

Users can also nest up to five (5) Rule Segments by selecting the applicable **Opening Parentheses** and **Closing Parentheses** as they build the Rule Segments, or by editing the Rule Segments after they have been defined.

**Note:** The Sequence of the Rule Segments defines their order in the Pre-Requisite Rules.
A complex set of Pre-Requisite Rules can be built using a combination of nested Rule Segments with Connecting Operators.

Once the Pre-Requisite Rules have been established, click the Excel icon to export an Excel file with 2 worksheets: Students meeting Pre-requisite and Course Information (course, pre-requisite narrative and pre-requisite rule).

Source Menu Options

Listed below are the definitions for the various Source menu options.

- **Scheduling Grade Level**: allows for criteria based on the grade level of the student for the course year. (ex. Scheduling Grade Level in (11,12) means the student must be in grade 11 or 12 to take the course)
- **Scheduling Location Code**: allows for criteria based on the location code on the student record for the course year.
- **Current Course**: allows for criteria based on courses that the student is currently taking.
- **Completed Course**: allows for criteria based on courses that the student has completed.
- **Assessments**: allows for criteria based on completed assessments.
- **Course Requests**: allows for criteria based on the student's other course requests.
- **Current Year Average**: allows for criteria based on the student's current year average for a selected subject. (ex. Current Year Average in English must be greater than 70%)
- **Cumulative Average**: allows for criteria based on the student's overall average for a selected subject.

Note: Current Year Average and Cumulative Average are based on the Early Warning Maps from the Student Performance Maps.
Class or Resource Class?

The terms **Class** and **Resource Class** both refer to sections of a Course, into which students can be scheduled. The difference between them is whether their specified Meeting Time information is fixed or variable.

**Classes** have all Meeting Time information fixed (Semesters, Days, Periods, Rooms, and Teachers), while **Resource Classes** contain variables for one or more of these Meeting Time fields.

The placement of **Classes** in the Master Schedule is manually determined, by their specified Meeting Time details. **Resource Classes** contain Meeting Time variables, which are used by the eSD® Scheduler’s **Builder** to determine the best placement of **Resource Classes** in the Master Schedule to fulfill students’ course requests.

The eSD® Scheduler’s **Sectioner** then sections students into the **Classes** and **Resource Classes** that have been placed in the Master Schedule. Resource Classes are converted to Classes when students’ schedules for the upcoming year are loaded.

New Class

Go to **Scheduling > Courses > Courses**. Once a course has been added to the catalog, users can create classes. A **Class** is a course section for which **ALL** Meeting Time information is specified.

On the **Courses** screen, click the **View icon** next to a course to open the **Course Details** screen.

From the **Course Details** screen, click **Class** to open the **Course Classes** screen to view/add classes.
From the **Course Classes** screen, users can **View**, **Edit** or **Delete** existing sections using the corresponding icons. Click **New** to create a new section.

From the **Add Course Class** screen, enter all section information using the available fields. Fields denoted with a red asterisk * are required before a record can be saved. When finished, click **Save**. For a complete explanation of the **Course Class Details** and **Meeting Times** fields, please see below.

### Course Class Details:

- **Section**: Each section must have a unique number within the course and cannot contain leading zeros. The section number cannot exceed four numeric characters.

- **Max Seats**: This field will be pre-populated with the value entered in the average seats field in the new course screen. Users can modify this value.

- **Link Code**: Link Codes allow users to create class links by applying the same class link to multiple sections. Class Links are created from **System > Scheduling > Course**.

- **Type**: Users must select **Fixed** or **Selective** from this drop-down menu if **Gender**, **Location** or **Grade** restrictions are to be used for this section. If **Selective** is chosen, the user will have the option to override the restriction when using the Scheduler Setup Wizard. If **Fixed** is chosen, the scheduler will be unable to override the chosen restriction.

- **Gender**: This field allows users to restrict the section to males only, females only, or both.

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**Note:**

See **Edit Class** on page 29 for the **Save** options when editing Classes that have enrolled students. Click the **Roster icon** to view the students enrolled in the class.

Users CANNOT **Delete** sections associated to **current/prior** Scheduling Years if the section has ANY associated class enrollment or TOR role records. Use the **Student Classes Add/Drop Report** to find associated class enrollment records, and the **Class Enrollment tool** to delete the individual students’ class enrollment records. Use the **TOR Role icon**, or the **Teacher of Record/Co-Teacher Report** to find and delete associated TOR roles.

Sections associated to a **future** Scheduling Year can be deleted after deleting all TOR Roles and dropping all students. Deleting the section also deletes the applicable students’ class enrollment records.

**Tip:**

At the Elementary level, **Section** numbers are often set to the corresponding classroom numbers.

This is particularly helpful for special-area classes, to quickly identify which sections “belong” to which teachers.
**Location:** Location allows users to create teams by applying the same location restrictions to multiple sections and students. Location Restrictions are created from System > Scheduling > Course.

**Primary Instruction Language:** Defaults to English. This field allows users to specify the primary language in which course instruction is provided.

**Grades:** If a grade restriction was applied to the Course, users will have the ability to restrict the grades that can be placed into the class by the eSchoolData Sectioner. *Exception:* For Study Hall courses, users MUST select at least one grade level for the class section, and can select all grade levels. If NO grades are selected, no students will be scheduled into the class section.

**Meeting Times:**

**Lockout:** When this checkbox is selected, the Meeting Time will not appear on student or staff schedules, and bell times associated with the Meeting Time will not be considered by the eSD® Sectioner when assigning students to classes.

**Semesters:** Select the semester(s) that the class will take place. Available semesters and semester patterns in the Semester drop-down menu are driven by the selections made in the Semester Pattern tab in School Setup.

**Days:** Select the day(s) that the class will take place. Available days and day patterns in the Days drop-down menu are driven by the selections made in the School Day Pattern tab in School Setup.

**From Period/To Period:** Select the period(s) that the class will take place. Available periods are driven by the parameters entered in the School Periods tab in School Setup. Class sections cannot be associated to both “regular” periods and Minute Block periods. Users will get an error message if they select “regular” periods and Minute Block periods for the same Meeting Time, or across multiple Meeting Times for the same section.

**Room:** Select the room that the class will take place in. Available rooms are driven by the entries made in District > Rooms.

**Teacher:** Select the staff member that will be teaching the class. Staff members must be assigned a Staff Type of “Teacher” from the Staff Member Information screen to appear in the Teacher drop-down menu.
Add MTP (Meeting Time Parameter): This button allows users to create an additional Meeting Time row. A maximum of seven (7) Meeting Time rows are allowed.

Role icon (👤): This icon is displayed when users Edit an existing section. It allows users to assign Teacher of Record Roles to the section for state reporting purposes.

Edit Class
Edits of Meeting Time parameters for Classes with enrolled students affect enrolled students’ schedules, and users will be presented with 3 options when they Save the changes: Save and Drop Students (default selection), Save and Keep Students, and Cancel and Stay on the Page.

Edits of Classes with no enrolled students, and edits of Class Details for Classes with enrolled students, have no effect on student schedules and will Save without the additional prompt.

New Resource Class
Go to Scheduling > Courses > Courses. Once a course has been added to the school’s course catalog, users can create resource classes. A Resource Class is a course section that includes variables for one or more Meeting Time fields.

Resource classes are used in conjunction with the eSchoolData Builder to automate the process of placing a section within the master schedule. The eSchoolData Builder selects a Meeting Time based on the chosen parameters and places the resource class to best fit the needs of students’ course requests.
Click the View icon next to a course to open the Course Details screen.

From the Course Details screen, click Resource Class to open the Resource Classes screen.

From the Resource Classes screen, users can View, Edit or Delete existing sections. Click New to create a new section.

Note: For more information about the Common field, see Common Resource Section on page 34.
On the **Add Resource Class** screen, enter all section information using the available fields. Fields denoted with a red asterisk * are required before a record can be saved. When finished, click **Save**. For a complete explanation of the **Resource Class Details** and **Meeting Times** fields, please see the following pages.

### Resource Class Details:

**From Section/To Section**: Users can create multiple resource sections with the same Meeting Time parameters. Each section must have a unique number within the course and cannot contain leading zeros. The section number cannot exceed four numeric characters.

**Type**: Users must select **Fixed** or **Selectable** from this drop-down menu if **Gender**, **Location** or **Grade** restrictions are to be used for this section. If **Selectable** is chosen, the user will have the option to override the restriction when using the Scheduler Setup Wizard. If **Fixed** is chosen, the scheduler will be unable to override the chosen restriction.

**Location**: Location allows users to create teams by applying the same location restrictions to multiple sections and students. Location restrictions can be created from **System > Scheduling > Course**.

**Gender**: This field allows users to restrict the section to males only, females only, or both.

**Max Seats**: This field will be pre-populated with the value entered in the average seats field in the new course screen. Users can modify this value.

**Grades**: If a grade restriction was applied to the Course, users will have the ability to restrict the grades that can be placed into the class by the eSchoolData Sectioner, up to a max of 4 selections.

*Important*: For **Study Hall** courses, users **MUST** select at least one grade level for the class section, and can select all grade levels (no max). If NO grades are selected, no students will be scheduled into the resource class section.

### Meeting Times:

**Add MTP (Meeting Time Parameter)**: This button allows users to create an additional Meeting Time row.
**Cmn:** This field is used to signify a common Meeting Time. When this checkbox is selected, the builder will schedule additional Meeting Times for the same period. *This function is used for advanced scheduling features and eSchoolData does not recommend using it without the proper training.*

**Semesters:** Select the number of semesters that a section should be scheduled from the # drop-down menu and leave the remaining Semester fields blank to allow the builder to choose which semesters the class will occur.

The Cond field is used in conjunction with the # and Semesters parameters. Users may select N from the Cond drop-down menu to indicate that a section should not be scheduled for the semester(s) chosen from the Semester drop-down menu, or select S to indicate that a section should be scheduled for the semester(s) chosen from the Semester drop-down menu.

Users may define the semester(s) that the class will occur. Available semesters and semester patterns in the Semesters drop-down menu are driven by the selections made in the Semester Pattern tab in School Setup. If a semester or semester pattern is chosen from the drop-down menu, the builder will schedule the section according to the selected parameter.

**Days:** Select the number of days that a section should be scheduled from the # drop-down menu and leave the remaining Days fields blank to allow the builder to choose which days the class will occur.

The Cond field is used in conjunction with the # and Day parameters. Users may select N from the Cond drop-down menu to indicate that a section should not be scheduled for the day(s) chosen from the Days drop-down menu, or select S to indicate that a section should be scheduled for the day(s) chosen from the Days drop-down menu.
Users may define the day(s) that the class will occur. Available days and day patterns in the **Days** drop-down menu are driven by the selections made in the School Day Pattern tab in School Setup. If a day or day pattern is chosen from the drop-down menu, the builder will schedule the section according to the selected parameter.

**Periods**: Select the number of periods that a section should be scheduled from the **#** drop-down menu and leave the remaining **Periods** fields blank to allow the builder to choose which periods the class will occur.

The **Cond** field is used in conjunction with the **#** and **From Period** and **To Period** parameters. Users may select N from the **Cond** drop-down menu to indicate that a section should **not** be scheduled for the period(s) chosen from the **From Period** and **To Period** drop-down menus, or select S to indicate that a section **should** be scheduled for the period(s) chosen from the **From Period** and **To Period** drop-down menus.

Users may select a conditional period range (1-9) from the **Cond** drop-down menu to define the range of periods that a section should be scheduled. Conditional Period Ranges can be created from Scheduling > Scheduling > Scheduler Setup Wizard.

If multiple Meeting Times are being created, users may select A, B, or C from the drop-down menu to indicate that a second Meeting Time should occur **After**, **Before** or **Contiguous** to (immediately before or immediately after) the first Meeting Time.

Users may define the period(s) that the class will take place. Available periods in the **From Period** and **To Period** drop-down menus are driven by the parameters entered in the School Periods tab in School Setup. If a period is chosen from the drop-down menus, the builder will schedule the section according to the selected parameter.

**Note**: Periods designated as Minute Blocks will NOT be included in the **From/To Period** fields. Resource Class sections cannot be scheduled into Minute Block periods.

**Note**: When scheduling multiple Meeting Times, the S option on the second and following Meeting Times indicates that the Meeting Time should be scheduled for the same period(s) as the first Meeting Time.
Room: The Cond field is used in conjunction with the Room parameter. Users may select N from the Cond drop-down menu to indicate that a section should not be scheduled in the room chosen from the Room drop-down menu, or select S to indicate that a section should be scheduled for the room chosen from the Room drop-down menu. Users can also select C (for Common Room) to indicate that all of the section’s Meeting Times should be scheduled in whatever room is selected by the sectioner.

![Room Table](image)

Users may define the room that the class will be assigned to. Available rooms in the Room drop-down menu are driven by the entries made in District > Rooms. If the Room field is left blank, the builder will assign a room based on department, room syllabus, and free times for available rooms.

![Teacher Table](image)

Teacher: The Cond field is used in conjunction with the Teacher parameter. Users may select N from the Cond drop-down menu to indicate that a section should not be assigned to the teacher chosen from the Teacher drop-down menu, or select S to indicate that a section should be assigned to the teacher chosen from the Teacher drop-down menu. Users can also select C (for Common Teacher) to indicate that all of the section’s Meeting Times should be assigned to whatever teacher is chosen by the sectioner.

Note: Users should NOT select D from the Cond drop-down menu, as it no longer drives any action.

Users may define the teacher that the class will be assigned to. Staff members must be assigned a Staff Type of “Teacher” from the Staff Member Information screen to appear in the Teacher drop-down menu. If the Teacher field is left blank, the builder will assign an instructor based on departments, staff courses, and free times associated to available staff.

Common Resource Classes

The Common Resource Class tool allows users to identify two resource class sections that should be assigned to the same Meeting Time by the eSD® Builder. This feature allows districts who use the Builder to easily schedule classes that should share the same Meeting Time and resources (teacher, room, etc.), while maintaining separate class rosters.
From the **Resource Classes** screen of the course that will be secondary (i.e., who will inherit the Meeting Time parameters of the primary resource class section), click the **Add Common Resource Class icon** for the applicable section. In the **Add Common Resource Class Section** window, enter the course number or part/all of the course name and click **Search**, then click the resource class section that will be linked as the primary resource class section (whose Meeting Time parameters will be used by the Builder). Click **Yes** to confirm the addition.

![Add Common Resource Class Section](image)

The linked primary resource class section will be listed in the **Common** field of the secondary resource class section. Click the **Unlink Resource Class icon** to remove the linked resource class section.

Example: A school has too few requests for French 4 and French 5 Honors to warrant two separate classes, so the classes will be scheduled for the same time, in the same room, with one teacher.

In this example, French 5 Honors is the secondary resource class, and will inherit the French 4 section’s schedule.
Resource Class Report

Go to Reports > Scheduling > Resource Class Report. The Resource Class Report allows users to view all resource classes for the selected scheduling year. Resource classes can be edited directly from this report using the Edit icon, or deleted using the Delete icon. In addition, this report can be exported to Excel using the Excel icon.

Teacher Roles

Go to System > Codes. Before a teacher of record can be associated to a section, teacher roles must be defined. From the Custom Codes drop-down menu, select Teacher Roles and click Search. From the Teacher Roles screen, users can Edit, Delete, or Sort existing teacher roles using the corresponding icons and buttons, or create a new teacher role by clicking New.

Note:
When creating Teacher Roles for PA State Reporting, please refer to PA-specific State Reporting User Guides.

Note:
Teacher Roles that are required for state reporting, or associated with a staff member and class, cannot be edited or deleted, and are indicated by the grey Edit icon and the grey Delete icon.
From the New Teacher Roles screen, enter the Code and Display name, and optional fields if desired, then click Save.

Click Sort to change the order in which the Roles display when assigning a Teacher of Record. Select a Role and click the Up/Down arrows to move it to the desired position. When finished, click Save.
Assigning Teacher of Record Roles

Go to Scheduling > Courses > Courses.

The Teacher of Record Roles feature allows users to track dosages of instruction provided by staff members to each student within a selected class. Once a staff member has been assigned a Role (Teacher of Record, Teacher of Record S/E, or Other), they will have access to the Teacher Interface for the selected section.

Users can search for all sections in which a staff member has an assigned Role record by using the Staff menu from Scheduling > Courses.

To assign a Teacher of Record Role to a Course Class, click the View Classes icon to open the Course Classes screen. Then click the Role icon to open the Class Meeting Time screen.

Tip: Create a Permission Group for Per Diem Subs who will be assigned the Role: Other, and use Group Permissions to control their level of access to the Teacher interface.

Note: When assigning Teacher of Record for PA State Reporting, please refer to PA-specific documentation for reporting Teacher of Record information.

Roles can also be assigned via the Assign Substitute button (Staff > Staff Schedule Report), as long as the teacher is assigned the Staff Type “ Substitute Teacher”.

For more information, see Assigning Substitute Teachers in the Secretarial User Guide, or Substitute Teacher Assignments in the Attendance User Guide.
In the Teacher of Record Information section, click the Add Role icon to create a new Role record. Enter all teacher information using the available fields. When finished, click Save. Users can Delete existing Role records using the corresponding icon. For a complete explanation of the Teacher of Record Information fields, please see below.

**Teacher of Record Information:**

- **Teacher:** Select the staff member to be assigned a Teacher of Record role.

- **Role:** Select the role for the teacher of record. Available roles in the Role drop-down menu are populated based on the Teacher Role list created in System > Codes.

- **Percentage:** Enter the dosage of instruction that students will receive from the teacher. The dosage is indicated in terms of percentage of time the teacher spends providing instruction to students. This field will automatically populate when a default percentage is indicated during teacher role creation, but can be changed as needed.

- **Start Date & End Date:** Enter the start and end dates for the teacher of record assignment to the section.

- **Total Days:** This field will populate with “auto calculate” by default. If this field is not edited, the number of instructional days a teacher is assigned to a section will automatically be calculated based on the start and end dates. The auto-calculate feature will also account for weekends and non-attendance days created in the building calendar. The auto-calculate feature can be overridden by entering the total number of days the teacher provides instruction in this field. Please note: day codes must be generated for the school from District > Calendar before the total days will be automatically calculated using this feature.

**Note:** Teachers assigned the Role: Other have access to the selected classes ONLY from 12:00 AM on Start Date through 11:59 PM on End Date.

**Note:** A Co-Teacher icon will display for the section when the assigned Teacher of Record is NOT the class meeting time Teacher.

**Note:** Each of the Roles below defaults to 100%.
- Teacher of Record
- Teacher of Record S/E
- TOR and TOR S/E

**Note:** Start Date defaults:
- Current Year courses: current Date
- Next Year courses: Start Date of course's first semester

Teachers assigned the Role: Other have access to the selected classes ONLY from 12:00 AM on Start Date through 11:59 PM on End Date.

**Note:** A Co-Teacher icon will display for the section when the assigned Teacher of Record is NOT the class meeting time Teacher.

**Note:** Each of the Roles below defaults to 100%.
- Teacher of Record
- Teacher of Record S/E
- TOR and TOR S/E

**Note:** Start Date defaults:
- Current Year courses: current Date
- Next Year courses: Start Date of course's first semester
**Students:** This field will default to all students enrolled in the section. To exclude students from instructional days associated to this teacher of record, click the Expand icon. A class roster will open, listing each student assigned to the section. Students can be excluded from by deselecting the checkbox next to each student record. If students have been excluded, this field will update once the teacher of record is saved and display the total number of students receiving instruction from this teacher.

### Teacher of Record/Co-Teacher Report

Go to *Scheduling > Courses > Teacher of Record/Co-Teacher Report*. The option to **Include Students** assigned to a teacher is checked by default. Click **Search** to generate the report, or use the various filters to limit the results. The report can be exported to Excel.

**Co-Teacher Report** (default option):

For all classes with associated **Role** records, the **Co-Teacher Report** (default option) lists the teachers with assigned Roles. It omits assigned teachers who have NO assigned Role. Click the **Role icon** next to a class section to open the **Class Meeting Time** page and add/edit the assigned Role(s).

**Note:**

When students are added to a section AFTER teacher roles have been created, the students are included by default for ALL teacher roles that have been created for the section.

**Note:**

The **Co-Teacher Report** also includes substitute teachers with Roles assigned via the Assign Substitute button (**Staff > Staff Schedule Report**).

For more information, see Assigning Substitute Teachers in the Secretarial User Guide, or Substitute Teacher Assignments in the Attendance User Guide.

**Note:**

Click the **Expand icon** to display the students associated to the Role.
Teacher of Record Report:
For each class with an associated State Course Number, the Teacher of Record Report lists teachers assigned any of the following Roles:

- Teacher of Record
- Teacher of Record S/E
- Primary ENL Instructor
- TOR and TOR S/E

If a class with an associated State Course Number has NO assigned Roles, only ONE assigned teacher, and the assigned teacher has a State ID, the assigned teacher will be listed with the Role of Teacher of Record. Click the Role icon next to a class section to open the Class Meeting Time page and add/edit the assigned Role(s).

Mini Courses
As the name indicates, Mini Courses are designed to be shorter than Courses than run during established Marking Periods. Mini Courses can run alongside of Courses, because Mini Course Cycles are not constrained by the Marking Period parameters.

For example, a Mini Course Cycle may run for part of a single marking period (e.g., four weeks within a 10-week marking period) or it may overlap marking periods (e.g., the final two weeks of a marking period through the third week of the next marking period).

A Mini Course Cycle’s Start & End Dates should not both match an established Marking Period, nor should a Mini Course Cycle run for the entire School Year. In those situations, schools should use Courses instead of Mini Courses. Courses have more robust grade reporting and grade analysis features than Mini Courses.

Important:
Mini Courses Cycles are designed to have different Start/End Dates than the established School Year and Marking Periods.

Note:
Grades for Mini Courses are included on Report Cards in the Marking Period when the Mini Course Cycle ends.
Mini Course Cycles

In the same manner as marking periods, Mini Course Cycles govern when mini course sections can be scheduled. However, unlike marking periods, Mini Course Cycles are not controlled by a definitive length of time.

Go to System > Scheduling > Mini Course Cycles. From this page, users can Edit mini course cycles, Delete mini course cycles that have not had mini courses assigned to them, or search for past or future year’s mini course cycles. The mini course cycles can also be exported to Excel. Click New to create a new mini course cycle.

Enter the Cycle Name, Start Date, and End Date, then click Add Cycle.
New Mini Course

Go to Scheduling > Courses > Mini Courses. From the Mini Courses screen, users can view a mini course catalog by selecting a school from the Building drop-down menu. Mini course catalogs can be filtered by Scheduling Year, or by Number, Name, Day, Department, Room, Period, Section or Cycles using the Criteria drop-down menu and the Search button. Users can View, Edit or Delete existing mini courses. The Mini Courses list can also be exported to Excel. To create a new mini course for the selected scheduling year, click New.

On New Mini Course screen, enter all course information using the available fields. Fields denoted with a red asterisk * are required before a record can be saved. When finished, click Save. For a complete explanation and glossary of the Course Details, Course Options, Subject, Department and Comments sections, please see below.

Note: The grey Delete icon indicates the Mini Course cannot be deleted because students have been assigned a section.

Note: Mini Courses can be flagged as Credit Recovery courses (Course Options section). Selecting this option will flag the Mini Course as Credit Recovery in students’ Previous Courses.
Course Details

**Course Number:** Each mini course (and course) must have a unique course number and cannot contain a leading zero. Course Numbers are alpha/numeric and can be up to eight (8) characters in length.

**Course Name:** This field serves as the internal label for the course, and it will be viewable to district staff members only.

**State #:** Needed for the mini course to be included in the state reporting extracts.

**Course Pre-Requisite, Description:** These fields serve as optional reference fields.

**Fee:** Indicates any fees associated with the mini course.

**Display Name:** This field serves as the external label for the mini course, and it will appear on all correspondence and reports.

**Course Level:** Course Levels can be used to assign course weights or add-on points in eSchoolData’s Grade Reporting Module.

**Curriculum:** Curriculum defines which set(s) of Learning Standards are available for association with teachers’ Connect Gradebook assignments. A mini course can be associated to only one Curriculum.

**Course Type:** Course Types denote categories of courses, and can be used to filter information when generating course reports in eSchoolData. In addition, course types are used to identify courses when creating Attendance Letter Jobs.

Course Options

**Yearly Averages:** Checking this box will include grades for the mini course in yearly averages and cumulative average calculations on transcripts.

**Class Ranks:** Checking this box will include grades for the mini course in class rank calculations.

**Transcripts:** Checking this box will display the mini course on transcripts.

**Honor Rolls:** Checking this box will include the mini course in honor roll calculations.

**Attendance:** Checking this box will allow users to take attendance for the mini course.

**PRC (Permanent Record Card):** Checking this box will display this mini course on the PRCs in eSD. (This does not correspond to the PRCs from Access.)

**Offered Course:** Checking this box will include the mini course in all reports and enable users to enter course requests. Leaving the box blank will prevent users from entering student requests for the mini course.

**Print on Schedule:** Checking this box will display this course on a student’s schedule.

**Credit Recovery:** Checking this box will flag the course as Credit Recovery on a student’s Previous Courses.

Subject

**Subject Name:** Mini courses must be associated to a subject. A mini course’s chosen subject can drive other features within eSchoolData, including the Teacher Interface and Mass Course Request tools.
Grade Grouping: Grade Groups allow schools to define separate sets of allowable grades for different groups or types of courses. A mini course can only be associated to one Grade Group at a time.

Priority: This field serves as the default priority for all student requests created for this mini course.

Grade Restriction: This field allows users to restrict by grade level the students who are being scheduled into this mini course. Leave blank for no restrictions, or select the grade(s) that will be allowed to take the course.

Department
  Department: Mini courses must be associated to a department.
  Credits: Indicates the number of credits that can be earned upon course completion.

Comments
  Typed Comments: This setting controls a teacher’s ability to enter free-text comments on Progress Reports and Report Cards.
  Selected Comments: This setting controls the number of selected or “canned” comments teachers can enter for Progress Reports and Report Cards.

Edit Mini Course

Go to Scheduling > Courses > Mini Courses. Mini Course catalogs can be filtered by name, number, day, department, room, period, section or cycles using the Criteria drop-down menu.

Existing mini courses will populate in the Results list, and can be Viewed , Edited or Deleted using the corresponding icons. Click the Edit icon to open the Edit Mini Course window.
From the **Edit Mini Course** screen, make any necessary changes. All fields with a red asterisk * are required in order to save changes. When finished, click **Save**. For a complete explanation and glossary of **Course Options**, **Subject**, **Department**, and **Optional Fields**, please see pages 43-45.

**New Mini Course Class**

Go to **Scheduling > Courses > Mini Courses**. Once a mini course has been added to the catalog, users can create classes. Click the **View icon** next to a mini course to open the **View Mini Course** screen.
On the **View Mini Courses** screen, click **Class** to open the **View Classes** screen.

![View Mini Courses](image1)

On the **View Classes** screen, users can **View**, **Edit** or **Delete** existing sections. Click **New** to create a new section.

![View Classes](image2)

On the **Add Class** screen, enter all section information using the available fields. Fields denoted with a red asterisk * are required before a record can be saved. When finished, click **Save**. For a complete explanation and glossary of the **Class Details** and **Meeting Times**, please see below.

![Add Class](image3)

**Class Details**

**Section:** Each section must have a unique number within the course and cannot contain leading zeros. The section number cannot exceed two numeric characters.

**Max Seats:** Enter a value for the new section.

**Meeting Times**

**Cycles:** Select the cycle from which that the class will take place. Available cycles are defined by the selections made in the Mini Course Cycle screen.

![Cycles](image4)

Note:
The **Assessment** and **Course Weights** buttons function the same as for Courses. For more information, see **View Course Details** on page 15.

Note:
Sections associated to **current/prior** Scheduling Years CANNOT be deleted if the section has any associated class enrollment records. Use the **Student Classes Add/Drop Report** to find associated class enrollment records, and the **Class Enrollment** tool to delete the individual students’ class enrollment records. Sections associated to a **future** Scheduling Year CAN be deleted after all students have been dropped. Deleting the section will also delete the class enrollment records of all students previously associated to the section.
**Days**: Select the day(s) that the class will take place. Available days and day patterns in the Days drop-down menu are driven by the selections made in the School Day Pattern tab in School Setup.

**From/To**: Select the period(s) that the class will take place. Available periods are driven by the parameters entered in the School Periods tab in School Setup. Class sections cannot be associated to both “regular” periods and Minute Block periods. Users will get an error message if they select “regular” periods and Minute Block periods for the same Meeting Time, or across multiple Meeting Times for the same section.

**Room**: Select the room that the class will take place in. Available rooms are driven by the entries made in District > Rooms.

**Teacher**: Select the staff member that will be teaching the class. Staff members must be assigned a Staff Type of “Teacher” from the Staff Member Information screen to appear in the Teacher drop-down menu. For more information on staff records, please see the Security: Account Maintenance User Guide.

**Add Rows**: This button allows users to create an additional Meeting Time row.

**Role icon ()**: This icon is displayed when users Edit an existing section. It allows users to associate Teacher of Record Roles to the section for state reporting purposes. Entering Teacher of Record information for mini courses is identical to the steps performed when assigning Teacher of Record information for courses.

**Links**

Go to System > Scheduling > Course. Links allow users to tie courses, classes and/or students together for scheduling purposes. The eSchoolData Scheduler uses three different types of links: Course Links, Class Links, and Location Restrictions. Each type of link must be created before it can be applied to courses, classes or students.

**Placeholder Courses** are an alternative to Class Links, eliminating the need to assign class link codes to multiple sections. Instead, Placeholder Courses allow users to create multiple Meeting Times within a section to represent each class within a link.
Course Links

**Course Links** are used to tie one course to another when using the eSchoolData Sectioner. The Sectioner will place students into sections for each linked course based on availability in the student’s schedule.

If the Sectioner is unable to schedule students into each linked course due to conflicts, then the student will not receive any of the courses and they will appear on the course request reject analysis reports within the scheduling run.

The Sectioner will only apply the course link requirement to students who have requests for EACH course within a link.

Course Links must be applied at the course level. Go to Scheduling > Courses > Courses. Click the **Edit icon** next to a course to open the **Edit Course** screen.

On the **Edit Course** screen, select a course link from the **Link Code** drop-down menu. When finished, click **Save**. Repeat this process for each course to be linked.

**Example:**

Course links can be used to tie lectures to labs when they are created as two separate courses within eSchoolData.

When using the Sectioner, the course link ensures that all students requesting both the lecture and lab courses will receive both courses or, if both are not possible, neither course.

**Note:**

Course Links can also be established when a **New Course** is created.
Class Links

Class Links are used to tie section(s) of one course to section(s) of another course when using the eSchoolData Sectioner. The scheduling engine will place students into sections with matching links or unlinked sections of each course based on availability in the student’s schedule. If the Sectioner is unable to schedule students into each linked section due to conflicts, then the unfulfilled request will appear on the course request reject analysis reports within the scheduling run.

Class Links must be applied at the class level. Go to Scheduling > Courses > Courses. Click the View icon next to a course to open the Course Details screen.

On the Course Details screen, click Class to open the Course Classes screen.

On the Course Classes screen, click the Edit icon to open the Edit Class screen.

Example:
Class links can be used to tie lectures sections to labs sections taught by the same instructor.

The class link will ensure that all students who receive the linked lecture section also receive the linked lab section.

Note:
Alternately, click the View Classes icon to open the Course Classes screen immediately (skips the Course Details screen).

Note:
Class Links can also be established when a New Class is created.
From the **Edit Class** screen, select a class link from the **Link Code** drop-down menu. When finished, click **Save**. Repeat this process for each section to be linked.

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**Location Restrictions**

**Location Restrictions** allow users to tie sections of courses to groups of students, in effect creating teams. Users apply the same location restriction to multiple course sections and multiple students. The Sectioner will match the location restrictions assigned to students with those assigned to sections when placing students into classes. If the Sectioner is unable to schedule students into each linked section due to conflicts, then the unfulfilled request will appear on the course request reject analysis reports within the scheduling run.

**Setting Location Restrictions for Sections**

Location Restrictions must be applied at the class level. Go to **Scheduling > Courses > Courses**. Click the **View icon** next to a course to open the **Course Details** screen.

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**Note:**
Alternately, click the **View Classes icon** to open the **Course Classes** screen immediately (skips the **Course Details** screen).
On the Course Details screen, click Class to open the Course Classes screen.

On the Course Classes screen, click the Edit icon to open the Edit Class screen.

On the Edit Class screen, select Fixed or Selectable from the Type menu (required to set a Location Restriction), then select the desired Location. When finished, click Save. Repeat this process for each section to be restricted by Location.

Note: Location Restrictions can also be applied to Resource Classes. Click Resource Class to open the Resource Classes screen.

The process of applying Location Restrictions to Resource Classes is the same as applying Location Restrictions to Classes.

Note: Location Restrictions can also be established when a New Class is created.

Note: When Selectable is chosen, the user will have the option to override the restriction when using the Scheduler Setup Wizard.

When Fixed is chosen, the scheduler will be unable to override the chosen restriction.
Setting Scheduling Locations for Students

Users can set students’ Scheduling Locations, either individually or en masse, to ensure that students are scheduled into course sections with the same Location Restrictions.

To set a single student’s Scheduling Location, open the student’s Profile, click Edit on the Profile tab, then select the student’s Scheduling Location.

To set students’ Scheduling Locations en masse, go to System > Scheduling > Mass Update Scheduling and select the Mass Update Scheduler Option.

Note:
For more information, see the Mass Update Scheduler Option section in the Scheduling: eSD® Scheduler User Guide.
Placeholder Courses

Placeholder Courses can be used as an alternative to class links, eliminating the need to assign class link codes to multiple sections. Instead, placeholder courses allow users to create multiple meeting times within a section and link each meeting time to an existing course.

When Placeholder Courses are converted (AFTER the Final Scheduling Run has been loaded), each meeting time becomes a new section of the linked course and is assigned the section number of the Placeholder Course section. As part of the conversion, students scheduled into the Placeholder Course sections will be assigned to the new sections of the linked courses.

Go to Scheduling > Courses > Courses. To create a placeholder course, click New to open the New Course screen.

Select Placeholder from the Course Type drop-down menu. Enter all additional required fields and click Save.
Once a Placeholder Course has been added to the course catalog, users can create classes or resource classes. From the Courses screen, click the View icon next to a course to open the Course Details screen.

On the Course Details screen, click Class to open the Course Classes screen.

On the Course Classes screen, users can View, Edit or Delete existing sections. Click New to create a new section.

Note: Alternately, click the View Classes icon to open the Course Classes screen immediately (skips the Course Details screen).

Note: To create Resource Class sections for a Placeholder Course, click Resource Class, then follow the same process for creating Class sections (described below and on the next page).
The section should contain a Meeting Time for EACH class to be linked, and each Meeting Time will contain a link to the Course that should meet at that time.

Enter the **Meeting Time** details. Click **Link Course** to view a list of the courses contained in the course catalog. Scroll through the list of courses, or use the filters at the top of the **Course Selection** window to narrow the list, then select the desired Course to be linked to that Meeting Time.

Click **Add MTP** to add another Meeting Time row, and repeat above steps for each additional Course Link needed. Once all classes that should be linked are entered, click **Save**.

AFTER the scheduling process is complete, the Meeting Times defined within the Placeholder Course section can be converted into individual sections of each linked course.

**Important:**
The Section numbers assigned to a Placeholder Course’s classes /resource classes MUST be different from the Section numbers assigned to the linked courses’ classes / resource classes. Otherwise, the conversion of Placeholder Courses will fail.

In addition, when linking the same course to multiple placeholder courses, the placeholder course section numbers must be unique across ALL of the placeholder courses to which the linked course is associated. Otherwise, the conversion of Placeholder Courses will fail.

eSD® recommends using section numbers that are well above the range of section numbers that might be assigned by the Builder.

**Note:**
For more information, see Converting Placeholder Courses in the Scheduling: Placeholder Courses User Guide.