

## ***PowerScheduler – Load Only*** (Using the Copy Master Schedule from Current Year Function)

**(NOTE: This assumes the Prepare To Build Checklist Was Completed)**

1. PRINT your (PowerScheduler) next year’s “Years & Terms” before you proceed.  
PowerScheduler > Years and Terms > Edit Terms. Example:

<span style="float: right; border: 1px solid #000; padding: 2px;">New</span>			
2015-2016 08/26/2015 - 06/03/2016			
Semester 1 08/26/2015 - 01/17/2016		Semester 2 01/18/2016 - 06/03/2016	
Quarter 1 08/26/2015 - 11/01/2015	Quarter 2 11/02/2015 - 01/17/2016	Quarter 3 01/18/2016 - 03/20/2016	Quarter 4 03/21/2016 - 06/03/2016

2. Verify that your Active Scenario to make sure “**Load Only**” is selected by clicking on the Scenario name:

**Load Only**  
 Use this scenario setting if a master schedule is copied or imported and you need to only load students.

3. **Copy Current Master Schedule: PowerScheduler > Functions > Copy Master Schedule:**

Option	Value
School	Butler High School
Source year (the school year that the Master Schedule is being copied from)	2014-2015
Clear existing scheduling terms in the destination school year	<input type="checkbox"/>
Check here to confirm you want to proceed.	<input checked="" type="checkbox"/>

Submit

- a. **Select** the Source Year, Check the “**Confirm to proceed**” box, and click **Submit**.

4. Run the **Master Schedule List** to review all sections that were copied, in List format.

### 5. Add new Courses – Optional

- a. Switch to the **District Office** to add a new course for next year.
- b. **District > Courses > New Course** (be sure the course number is unique)
- c. **Select the School(s)** to receive the new course and **select the School Year(s)**. Recommend that both the current and next year be selected.
- d. Switch back to the **school**. Select **Courses > Manage Courses for This School**. Locate the new course and confirm that the checkbox is checked.

- e. **PowerScheduler** > **Catalogs** > **Edit Catalog** > New courses will appear unchecked, so check the box to add it to the catalog. If you don't see a course that was offered previously, click "**Unavailable Courses**".

## 6. Run Reports:

- a. Course Request Tally
- b. Requests by Course
- c. Requests by Student
- d. Course List
- e. Student List
- f. Student Request Tally
- g. Room List

## 7. Determine your Active Build ID & Course Catalog ID.

- a. Click on PowerScheduler or Scenarios; look for your *active build name*.
- b. Click on PowerScheduler; Click on Course Catalogs; look for your *new catalog name*.
- c. PowerScheduler > Functions > Update Selections:
- d. Current Table: **ScheduleBuilds** > Click: Select All \_\_\_ Records in this school.
- e. List View > Find your active build; your Build ID is in the left hand column.
- f. Update Selections > Change the Current Table to: **ScheduleCatalogs** > Click: Select All \_\_\_ Records in this school.
- g. List View > Find your new catalog > your catalog ID is in the left hand column.
- h. Record your BuildID and CatalogID, as you may need these numbers later on.

**8. Course Preferences:** PowerScheduler > Courses > Select a Course. Recommend that the following be set at minimum:

- a. Check: Schedule This Course
- b. Set: Maximum Enrollment
- c. Check: Close Section After Max
- d. **NOTE:** You may use the function, "AutoFill Course Information" to set these fields for groups of courses. To select groups of courses, use Function, "Update Selections" & select the ScheduleCourseCatalogs table. Click on "Select Records by Hand". Select courses that match your **active catalogID**. Then return to the Functions menu and select Autofill Course Information.

## 9. Adjust the Master Schedule – Optional

- a. **PowerScheduler** > **Sections** > Click on the Course Name for which you want to adjust a section.
- b. Click the specific section number to be adjusted, or click NEW to add a section.
  - Edit the Schedule (Expression), Teacher, Room, Maximum Enrollment, etc.
- c. To Delete a section, click on 'Delete' at bottom of Edit Section page.

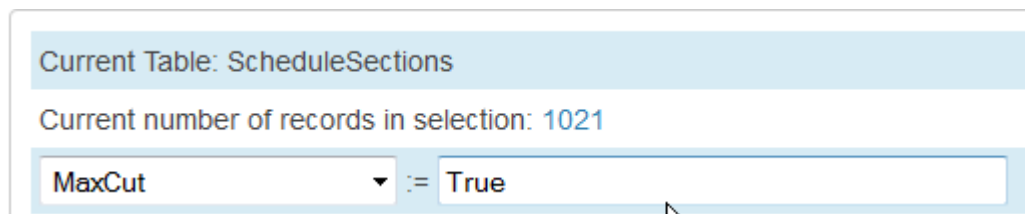
**10. Modify Sections as needed.** PowerScheduler > Sections > select a course > click on the section number to view/modify.

**11. To Add Sections to a New Course:**

- a. PowerScheduler > Courses > Select the new course.
- b. Click on the **Sections** tab.
- c. Click “**New**” to create a section. Enter the following fields:
  - Select the appropriate Term
  - Period/Day(s)
  - Select the Teacher
  - Room (Associate)
  - TYPE THE SECTION NUMBER
  - Check Close Section at Max
  - Maximum Enrollment

**12. Close Sections After Max:** This is a checkbox on the Sections record; the setting is not copied over during the Copy Master Schedule process. It will be necessary to check this box on all sections prior to running the Load.

- **PowerScheduler > Functions > Update Selections**
- Select the **ScheduleSections** table. Select the BuildID field, then type your BuildID number in the empty box. Next, click on the blue button: “Search all \_\_\_\_\_ records in this school”.
- Click on “Modify Records”. **USE EXTREME CAUTION!** From the dropdown list in the left hand box, select the field “**MaxCut**”. Enter “True” in the right-hand box:



**13. Maximum Class Size:** To set a maximum class size for all sections, and then adjust this field for a group of sections, you may use the Update Selections function with the ScheduleSections table. You will need your active BuildID. Again, **use extreme caution!** The fieldname for Maximum Class Size is: MaxEnrollment

**14. Dependent Sections:** If your school uses Dependent Sections, these ARE copied over from the Source year.

15. **Teams** – Optional. If any of your sections last year had a “Team” designation, you will need to add the Team to the new year’s **sections**, as this field is not carried over when you copy your master schedule. Teams need to be added to Students as well, unless you want dynamic teaming as opposed to static. Teacher team designations are not lost from year to year (on the Teacher Preferences page).
16. Add **Course Relationships** where needed. (Only those used by the Load.)
17. Enter **Load Priorities**, (optional) as needed. The Default value is 10. Recommended values are: 1, 3, 7, 15, 31, and 63. (1 = the highest priority.)
  - a. To update one course: PowerScheduler > Courses > Preferences tab
  - b. To mass update groups of courses: Use Update Selections function > select the ScheduleCourseCatalogs table; select records that match your catalogID; Select Records by Hand.
  - c. Now return to Functions & use Auto Fill Course Information to update Load Priority.
18. **Add new teachers** (live side). Use the Scheduling Setup page to set the following fields:
  - a. Schedule This Teacher
  - b. Department
  - c. Preferred Room
19. **Define Teacher Information** as needed (may use Auto Fill Teacher Info). (Schedule This Teacher.)
20. Add **Load Constraints** as needed. See handout.
21. **Load Validate**: Validate Data until Error Free (**Load – select Validate Only**)  
Recommend checking the “Close Sections at Maximum” box. Click the “Q” next to “Load” to view the results. Correct any validate errors.
  - a. If you wish to load only certain grade levels, select the students before running the load, then select “Reschedule the \_\_\_\_\_ selected students” box.
22. **Load Students**. Re-Run the Load > uncheck “Validate Only”. Recommend checking the “Close Sections at Maximum” box. Click the “Q” next to “Load” to view results/percentage of successfully scheduled students.
23. **Import Results**. Click on the “Q” beside “Load”, then ONE CLICK on “Import”. Wait for process to complete.
24. **Evaluate the Load** using Post Load Reports:
  - a. Master Schedule List
  - b. Schedule Course Enrollment

- c. Schedule Results by Grade > focus on chart at bottom of screen.
- d. Student Schedule List
- e. Room Utilization
- f. Student Schedule Report
- g. Non-Scheduled Student Requests for Scheduled Courses
- h. Individual Student Conflict Matrix

**25. Manually adjust student schedules** after all loading is complete.

**26. Manually Enroll Students - Optional**

- a. PowerScheduler > Students > Select Students to be Scheduled into a class > Select Students by Hand > Functions > Schedule Mass Enroll

**Student Scheduling Functions**

What do you want to do for all of the 3 students you have selected?	
Function	Description
<a href="#">Export Using Template</a>	Uses a template to export data on currently selected students.
<a href="#">List Students</a>	Prints a quick list of currently selected students.
<a href="#">Mass Add Requests</a>	Lets you enter the same course request for selected student at one time.
<a href="#">Mass Delete Requests</a>	Lets you delete the same course request for selected students at one time.
<a href="#">Next School Indicator</a>	Sets the next school indicator for currently selected students.
<a href="#">Print Reports</a>	Prints reports for currently selected students.
<a href="#">Print Mailing Labels</a>	Prints mailing labels for currently selected students.
<a href="#">Quick Export</a>	Exports data on currently selected students.
<a href="#">Reports Menu</a>	Goes to the Reports menu.
<a href="#">Schedule Mass Enroll</a>	Enrolls currently selected students in a section.
<a href="#">Schedule Reports Menu</a>	Goes to the scheduling reports menu.
<a href="#">Work with these students</a>	Make the selected students the working group.

**Mass Enroll**

**Mass enroll the selected students into which class?**

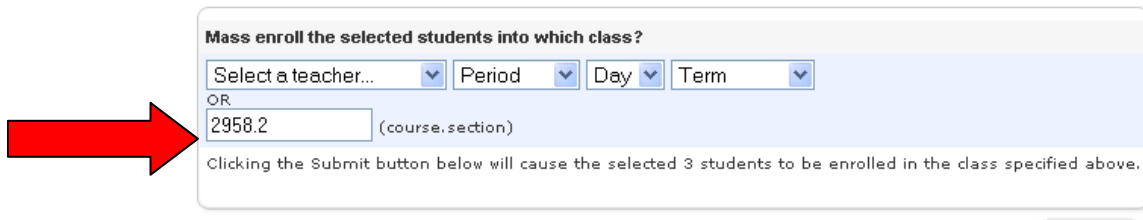
OR

(course.section)

Clicking the Submit button below will cause the selected 3 students to be enrolled in the class specified above.

- b. Do one of the following:
  - i. Select a Teacher, Period, Day, Term. OR:
  - ii. (Recommended method) Enter the course.section in the blank text box.  
Example:

## Mass Enroll



Mass enroll the selected students into which class?

Select a teacher...  Period  Day  Term

OR

(course.section)

Clicking the Submit button below will cause the selected 3 students to be enrolled in the class specified above.

### 29. To Print Future Student Schedules:

- For a “Report Card” format, edit the “Schedule Listing” & check “Use Future Schedule” checkbox:

#### Student Schedule Listing for Report Card: PSU - Student Schedule

Option	Value
Column Title <a href="#">Style</a>	Helvetica 10 (B) <input type="button" value="v"/>
Class Listings <a href="#">Style</a>	Helvetica 10/12 <input type="button" value="v"/>
Use Future Schedule (student's schedule for next year)	<input type="checkbox"/>

30. **After the end of the current school year, but BEFORE the EOY** process has been run, it will be necessary to run the “**COMMIT**” in order to copy the new master schedule and student schedules from PowerScheduler to the Live side. Here are some important notes:
- a. Feel free to contact NWOCA’s Student Services department for assistance with the Commit.
  - b. Create Years and Terms on the Live Side for the next school year. School > Years and Terms > New.
  - c. Make sure the starting/ending dates on the Live Side **exactly match** those in PowerScheduler. (Now is the time to make corrections if necessary – BEFORE the commit is run!)
  - d. Make sure that the “Days” on the Live Side have the same “Name” and “Abbreviation”. School > Days
  - e. Create the new school year Calendar on the Live side. Automated School Calendar may be used. At minimum, run the process to set up the dates between the first and last day of the new school year. Non-School days can be entered later.
  - f. PowerScheduler > Commit