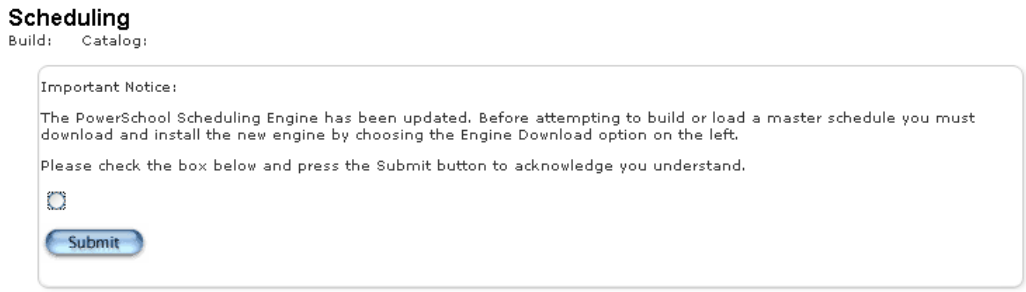
2014-15 PowerScheduler Prepare to Build Checklist

*****(*BEFORE YOU START – Create the full year in Years And Terms in the District Office. Then create the new year as well as all terms at the "School" in which you will be working.******

1. **Create a Scenario – AutoScheduler Setup:**

   a. In the School where the students will be scheduled, click on **PowerScheduler.**

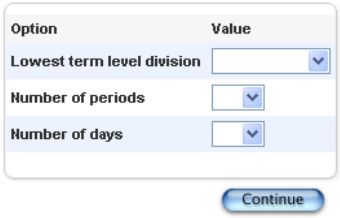
   b. The notice displayed below is a reminder that you need to download the PowerSchool Scheduling Engine before you Build your schedule. First-time PowerScheduler users will see this Notice:



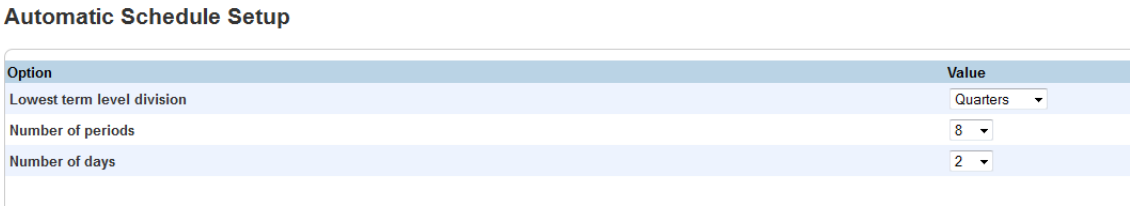
Check the box to acknowledge this and click **Submit**, even if you do not plan to utilize the Build/Load functions.

   c. Click on **AutoScheduler Setup**.

   d. Define the Lowest Term Level, Number of Periods, and Number of Days.



   e. Select the term that represents the length of your ***shortest*** class. For example, if you only have full-year classes, select "Full Year"; if you have semester classes, select "Semesters"; if you have 9-week long classes, select "Quarters".



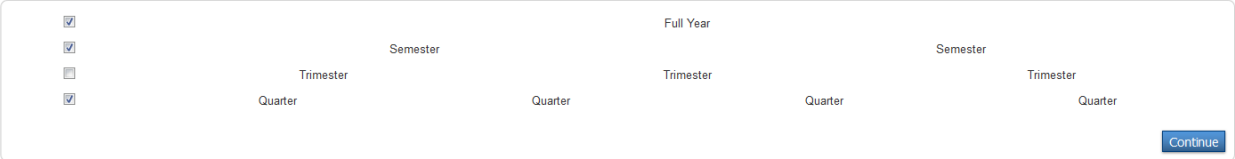
f. Select the number of periods and days; typically the same as for the current year, but you may modify these values.

- "Days" refers to the number of days in your rotation or Cycle; not how many days school meets each week.
- Click "Continue".

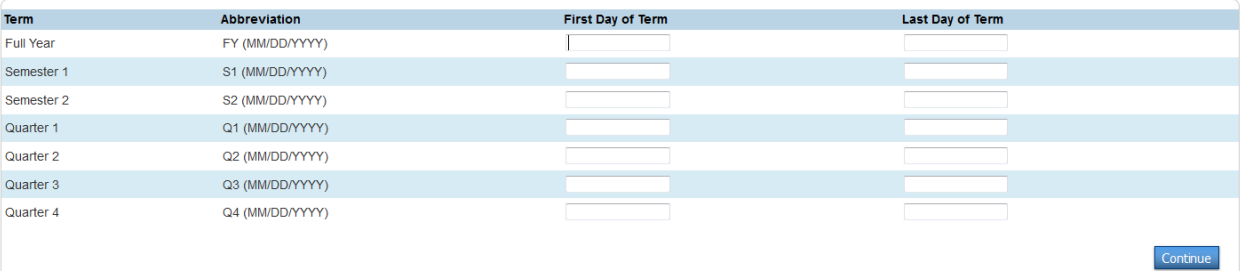
g. On the next screen, check all appropriate scheduling terms for your school. Click "**Continue**". (These terms reflect section length, not grading terms.)

- ***NOTE: You need to check both the full year and quarter boxes checked at a minimum, even though you may not have full year or quarter length classes. There are issues with attendance and reports that may result if these boxes are not checked. Not having quarters checked will also cause object reports to pull attendance incorrectly.***

Automatic Schedule Setup - Schedule Term Selection



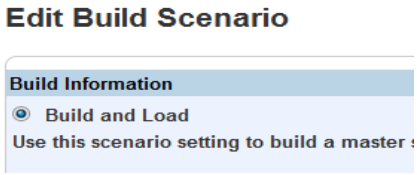
h. **Term Dates:** Enter the first and last day of the school year, then populate the dates of each of the remaining terms. ****Make sure no gaps exist between term dates***! Click **Continue.**



Term	Abbreviation	First Day of Term	Last Day of Term
Full Year	FY (MM/DD/YYYY)		
Semester 1	S1 (MM/DD/YYYY)		
Semester 2	S2 (MM/DD/YYYY)		
Quarter 1	Q1 (MM/DD/YYYY)		
Quarter 2	Q2 (MM/DD/YYYY)		
Quarter 3	Q3 (MM/DD/YYYY)		
Quarter 4	Q4 (MM/DD/YYYY)		

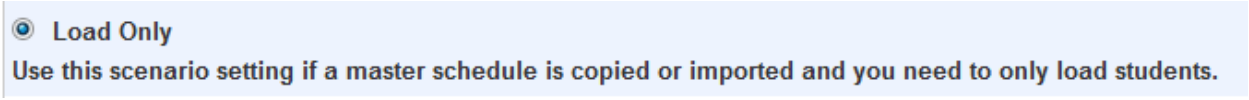
- **(Note:** For future reference, these dates must exactly match the years/terms dates created on the live side for the same school year.)

i. Check "**Build and Load**", enter a Build description, verify the number of terms, periods, and days. The future scheduling year will be the Build Name by default.



OR:

j. Check "**Load Only**" if you plan to load students into an existing master schedule or one you will copy from a previous year:

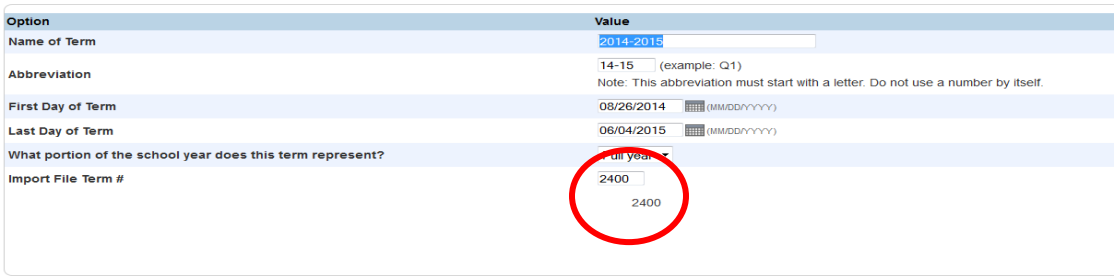


1. Check "**Active Build**" if not already checked.
2. The Course Catalog menu will not contain options for first-time PowerScheduler users. If this field is populated, select the BLANK option. This field should be left blank at this point. If a catalog is selected, every course in the district may be included by default, and adjustments will most likely be needed.
3. Scroll to bottom of page and click **Submit.**
4. To make adjustments to the Build Name, Build Description, Periods, or Days, click on "**Scenarios**" under Scheduling Setup, then on the Scenario Name.

2. **Years and Terms**: PowerScheduler > Years and Terms (under Scheduling Setup)

a. You will notice that the "Year" name is "Full Year", and the "Abbreviation" is "FY". Click on "Edit Terms" and modify these fields. Change "Full Year" to "2015-2016", and for Abbreviation, change "FY" to "15-16".

b. Enter **Import File Term #**(correct value is displayed below the box) Click **Submit**.



Note: 2014-2015 = 2400
2015-2016 = 2500
2016-2017 = 2600

c. **Open** the link for each of the remaining terms and **populate the Import File Term #** for each**.**

3. **Set Schedule Year:** PowerScheduler > Functions (Under "Tools") > Set Schedule Year

   a. Select the **new school year** from the Years menu; click **Submit.**

   b. This step allows students to enter course requests in the Student Portal for the future year.

   c. This step also links the course request screens you will create in PowerScheduler to the future year.

4. **Set Schedule Year in the *Feeder School***

   a. In order for the incoming grade level to be allowed to request courses for your school for the next school year, these 2 steps are required:

      - Create **future year** in Years and Terms on the **"Live Side."**
      - Switch to the Feeder School > PowerScheduler > Years and Terms > **Create the Full-Year term minimum,** if not already created**.**
      - PowerScheduler > Functions > Set Schedule Year.

5. **Creating the Course Catalog**

   a. The course catalog is a set of courses offered during a specific school year.

   b. Create a new Course Catalog each year.

   c. **PowerScheduler** > **Course Catalogs** (under Scheduling Setup) > **New** (enter a Name & Description)

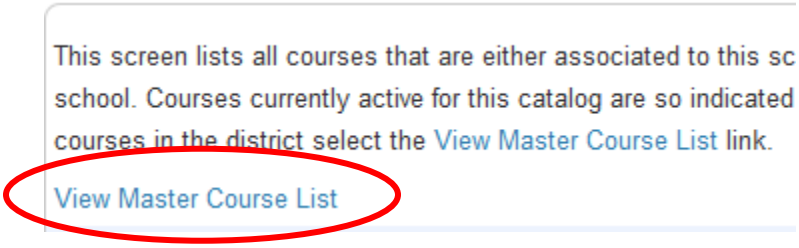
   d. Click **Submit**.

   e. Select **Scenarios > select the active scenario by clicking on the name > from the Course Catalog menu, select the new catalog. Click Submit.**

   f. Below Scheduling Setup, Select **Course Catalogs >** click on **Edit Course Catalog** for the newly created catalog.

      - By default, the system checks all courses.
      - Clear the checkbox for any course you want to remove from the catalog.
      - New courses added to PowerSchool after the catalog was created will appear unchecked.
      - You may sort the list by clicking on any of the blue column headers: Course Name, Course Number, or Active Status (sorting by Active Status causes deselected courses to appear at the bottom of the list).

- If you need to activate a course not listed, that was offered in a prior year, click "**View Master Course List".** (This option is displayed in blue at the top left side of the list.)



- Activate the course, then navigate back to the catalog and confirm that it is checked and available for scheduling.

6. New Courses to be Offered for Next Year:

a. New Courses can be created on the Live side and associated to the PowerScheduler Course Catalog at any time.

b. Any new courses to be offered should be created on the Live side at the **District Office** level first, then associated to the school's Courses table and to the school's new course catalog.

- Switch to the **District Office** to add a new course for next year.
- **District > Courses > New Course**
- **Select the School(s)** to receive the course and the **School Year** – probably only select the new school year.
- Enter the Course Name and Course Number (be sure the course number is unique). Complete the remaining fields as needed. Click **Submit**.
- Switch back to the **school.** Click on **School** > **Courses** > **Manage Courses For This School**. Locate the new course and confirm that the checkbox to the left is checked.
- Click on **PowerScheduler** > **Course Catalogs** > click on **Edit Course Catalog** for the new catalog.
- Click on "**View Master Course List**". Locate the newly created course; **check** the box next to the newly created course; click **Submit**.

7. Defining Optional Schedule Parameters

a. **Periods:** PowerScheduler > Periods

- The number of periods that appear here was defined during the creation of your Scenario; this cannot be altered here. Here you may edit the period name and/or abbreviation, indicate which periods are "Core" periods, and adjust the order in which they are displayed.
- Note: Adjusting the sort order of periods may cause the Matrix View page on for student schedules to be wrong. The List View should be correct. There is a workaround on PowerSource/#56950.

b. **Days:** PowerScheduler > Days

- The name and/or abbreviation for each day may be changed here.
- The number of days can be altered via the Edit Scenario page.
- A schedule day or cycle is NOT the same as a calendar day.

c. **Departments:** PowerScheduler > Departments

- PowerScheduler prefers that courses, rooms and teachers belong to Departments.
- When the system builds a master schedule, it attempts to schedule a course into a room belonging to the appropriate department.
- Departments set up on the Live side will flow into PowerScheduler.

d. **Facilities:** PowerScheduler > Facilities (optional)

- Some courses require special equipment or facilities, such as biology and chemistry requires a lab and physical education requires a gymnasium.
- Courses and Rooms may be associated to Facilities.

e. **Section Types:** PowerScheduler > Section Types (optional)

- Example: Boys/Girls (P.E. classes)
- For a multi-section course, section types may be used to restrict or identify students in each section.
- The teacher who instructs this course will have a matching section type assignment.

f. **Teacher Teams:** PowerScheduler > Teams (optional)

- PowerScheduler allows teaching teams
- Teachers, Students, and Sections are tagged with the team name.
- Teams may be either static or dynamic.
  - If you define static teams, you manually assign each student to a particular team.
  - If you create dynamic teams, you define the team names and assign teachers to the teams, but allow the system to decide which students to assign to which teams for the best possible balance.
  - The Team Name and Number are displayed on the Teams page. Use the Team Number to assign students to a team.

g. **Houses**

- Students can be separated into "Houses"; for example, grades 9 & 10 in House A, and grades 11 & 12 in House B.
- Determine which rooms, teachers, and students belong to each house.

h. **Buildings:**

- Rarely used.

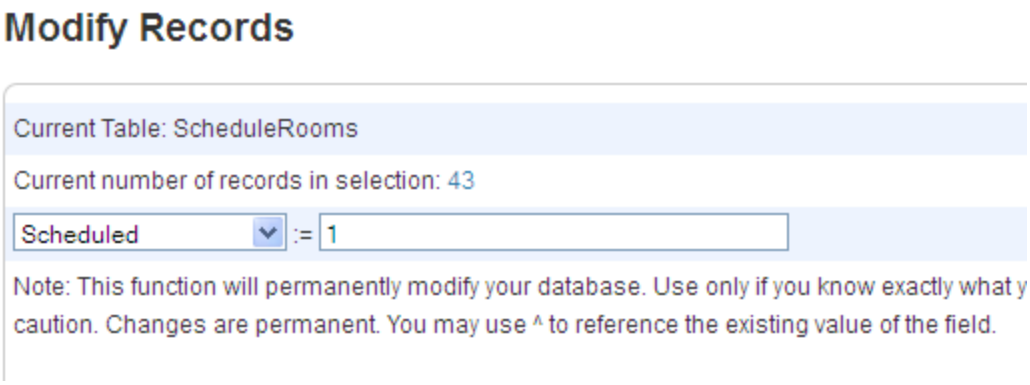
8. Defining Rooms

a. Rooms may be defined in any of the following ways:

- Individually
- Auto-Generate from an existing Master Schedule
- Auto-Create rooms with a predefined set of criteria
- Export rooms from the Room table and import them back into the Schedule Rooms table.

b. Fields in the ScheduleRooms table may be mass-updated by using Update Selections.

i. PowerScheduler > Functions > Update Selections > ScheduleRooms table.
ii. Select your school's rooms by selecting on the SchoolID field.
iii. Click on "Modify Records"
iv. The field for "Schedule This Room" is "Scheduled"; set it to '1' (to check the box) *(see screen shot on following page)*



9. Defining Student Information

This step is needed to get students into PowerScheduler so that they are included in your scheduling activities for next year. Student Scheduling Preferences must be entered before students begin to enter course requests.

- **<u>Set Next School Indicator</u>** for all grades
  - Select a grade level, and from the Group Functions menu, select Next School Indicator. Enter the appropriate next school for that particular grade level.
  - <u>Do all grade levels</u> to be sure you grab students who enrolled after the EOY process, INCLUDING students coming into your building from the feeder school.

- **<u>Auto-Filling Student Scheduling Preferences</u>**
  - **PowerScheduler > Functions > Auto-fill Student Information**

- Updating Student Scheduling Preferences Using Update Selections

Auto-Fill Student Info

Field Name	Grade 8	Grade 9	Grade 10	Grade 11	Grade 12	Grade 13	Grade 14
Next Year Grade	9	10	11	12	99	13	14
Priority	40	30	20	10			
Schedule This Student	Yes	Yes	Yes	Yes	No	No Change	No Change
Year of Graduation	2018	2017	2016	2015	2014	2014	2014

Submit

Be sure to check that the graduation year is correct. Note: The "Field Name" reflects the current year grade level for each student. Example, the students included under "Grade 12" include the current year seniors that will graduate this coming spring. *(The examples above may not reflect the graduation years for this scheduling period.)*

- Manually for individual students
- Must be done for the incoming grade level in the feeder school as well.

10. Entering Student Course Requests

a) Course Recommendations

- Certain courses may require a teacher's recommendation prior to students submitting course requests.
- Teachers may submit recommendations in PowerTeacher.
- Administrators may edit and delete teacher recommendations.
- Recommendations may be submitted by Administrators on the Live side via the Request Management page.

b) Create Course Groups

- Suggest do not include symbols in course group names.
- Suggest keep the course group name rather short; due to a limited no. of char.

c) Create Student Course Request Pages

- Suggest do not include symbols in request screen names.
- Suggest keeping the request screen name rather short; there may be a limited no. of characters.
- Do not recommend that multiple users work simultaneously in same school on creating course groups and/or request screens.
- Activate the Course Request Forms when ready.

d) Student Course Requests may be entered using various methods:

- Individually in PowerScheduler
  - Select Student > Requests > New > Associate (Hold down CTRL key and click on courses to be added)
- Via the Student Portal – Request Screen must be activated in PowerScheduler.
- For individual students, on the Live Side, using Request Management page. (Request Screen must be activated in PowerScheduler.)
- To mass load course requests inside PowerScheduler:
  - Select students
  - Click on Functions > Mass Add Requests
  - Click on Associate > Select a course > Select a Request Type > Click Submit. Click on 'Back' to add another course for same students.
    - Priority: If you selected Alternate in the Request Type field, enter a priority for the request. The lower the number, the higher the priority and the more likely these students will be scheduled into this alternate class.
- NOTE: If you have selected students by hand, then have lost the "Functions" button, but need to work with those same students, here is a workaround:
- Modify the URL as follows: remove all characters after students/ and add **functions.html**

e) WARNING!! If the district has installed the Power Data Solutions bundle, the following custom field will need to be checked: "Allow Student To Submit Requests", which appears on the Scheduling Setup page.

- **Sched_AllowRequests -** use Student Field Value; it **must be set to a '1'.** (Setting it to "True" does not work!)

11. Course Prerequisites

a. Done on the Live side
b. School > Courses > Edit the Course > click on “Prerequisites” tab.
c. Type a note in the box, click SAVE (without the note, the rules are not visible to the student)
d. Now, for same course: Select the + sign to the right of the course that will be assigned a prerequisite
e. Pick a Rule Type, click the ADD button
f. If there are multiple rules and the student must meet any of them, change the default “All Of” to “Any Of”
g. Select a Rule Type
h. CLICK SAVE
i. NOTE: This feature will not work if course number is missing on Historical Grades.

12. Run Reports

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