

Elementary Scheduling – Using **PowerScheduler**

(Using the Copy Master Schedule from Current Year Function)

[This method will require the COMMIT process after the school year is over, but before EOY is run!]

1. ___ **Create the Full Year Term:** On the Live Side, go to School > Years/Terms and click New.

2. ___ **Next School Indicator:**

- Set the Next School Indicator for students in grade levels that will remain in this school next year: Do a search such as: `grade_level<5` (appropriate grade levels for scheduling next year in your building).
- From the Group Functions list, select “**Next School Indicator**”.

Now select your school from the list of schools and click Submit:

Next School Indicator - Crestwood Elementary

Change the next school indicator for the currently selected 223 students to

Crestwood Elementary	▼
Crestwood Elementary	
Park Elementary	

Submit

3. ___ **Next School Indicator for pre-registered students:**

- Enter a search command such as the following to select pre-registered students who will be in your school next year: `/enroll_status=-1;grade_level<5` (less than your outgoing grade level)
- Select the group function, “Next School Indicator” and choose the appropriate value.

4. ___ **Next Year’s Incoming Grade Level:**

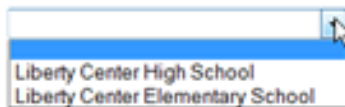
(Repeat the steps to assign a next school indicator in the feeder school, if there is one.)

5. ___ **Next School Indicator for students being served outside your building:**

- To prevent non-attending students (such as open enrolled out, etc.) from being included in PowerScheduler, temporarily remove their “Next School Indicator”. Use a search command to select non-attending students, **excluding the outgoing grade** level:

Example: `grade_level<5;oh_districtrelationship=3`. This will select all students who are in your school but not being provided instruction by your district.

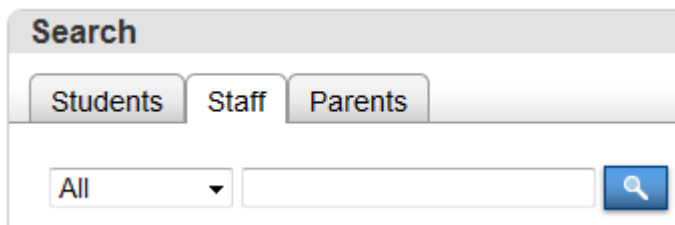
- From the Group Functions list, select “**Next School Indicator**”.
 - Select the **blank** value from the drop down list of schools.



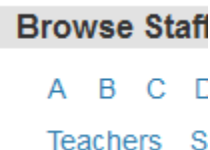
- Click **Submit**. **NOTE:** The Next School Indicator will eventually need to be reassigned to these students, as it is required for the End of Year process.

6. ___ Teachers: (Live Side) To confirm that all necessary teachers to be included in PowerScheduler for next year, use this method:

On the **Live Side**, From the Start Page, click on the **Staff** tab:

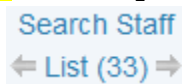


Now click on the blue link, "**Teachers**" under "Browse Staff":



Click on a teacher name, then go to the **Schedule Setup** page, and make sure the checkbox for "**Schedule This Teacher**" is checked. Use the **left/right arrows** at the top of the menu to scroll through

your teachers and check or un-check this box as needed:



To set this field for a group of teachers, you may use the group function, "Select Teachers by Hand", then once a group has been selected, choose the "Set Staff Field Value" function.

The field to modify is: Sched_Scheduled

In the box beneath this field name, type "True" and click Submit. All records that have a different value in this field will appear, along with the current value and the new value. Scroll to the bottom of the list and click "Submit".

7. **Scheduling Setup for Students:** (Click on PowerScheduler from the Start Page)

All students who will be enrolled in your school next year, including any incoming grade levels from another school, need to have the fields set on the **SCHEDULING SET UP PAGE**. Use the method below to auto-fill these fields (this process will include all students whose “Next School Indicator” is set to the school you are working in):

Path: **PowerScheduler** > **Functions** > **Auto Fill Student Information**

Here is a sample screen shot:

Auto-Fill Student Info

Field Name	Grade -2	Grade -1	Grade 0	Grade 1	Grade 2
Next Year Grade	<input type="text" value="-2"/>	<input type="text" value="0"/>	<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text"/>
Priority	<input type="text"/>	<input type="text" value="30"/>	<input type="text" value="20"/>	<input type="text" value="10"/>	<input type="text"/>
Schedule This Student	<input type="text" value="No Change"/>	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>	<input type="text" value="No Change"/>
Year of Graduation	<input type="text"/>	<input type="text" value="2028"/>	<input type="text" value="2027"/>	<input type="text" value="2026"/>	<input type="text"/>

Leave fields blank for any grade levels not to be scheduled in your school next year or to make no change. Modify some students individually if necessary.

8. **Determine the Current Year (Live side) Terms, Days, and Periods:**

- Since you will be copying your current year master schedule over into PowerScheduler for next year, your Terms, Days and Periods that you set up in PowerScheduler need to match your current year settings on the **Live Side**. Check the Live Side to see how many Terms, Days, and Periods you currently have in your school. **Record this information.**
 - School > Years and Terms > Edit Terms (for the current year)
 - Lowest Term Level: _____
 - School > Days: _____
 - School > Periods: _____

9. ____ Create a Scenario – PowerScheduler > AutoScheduler Setup:

- Now, in the School where the students will be scheduled, click on **PowerScheduler**.
- You may encounter an Important Notice. 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:**

Scheduling

Build: Catalog:

Important Notice:

The PowerSchool Scheduling Engine has been updated. Before attempting to build or load a master schedule you must download and install the new engine by choosing the Engine Download option on the left.

Please check the box below and press the Submit button to acknowledge you understand.

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

- **Click on AutoScheduler Setup.**
- Define Years & Terms, Days, and Periods for a “Load Only” scenario.

Option	Value
Lowest term level division	<input type="text"/>
Number of periods	<input type="text"/>
Number of days	<input type="text"/>

- 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”. This is not to be confused with how often you issue grade cards. ***This is the term length of a class; the duration of time for which a student is enrolled in a class.***

- Enter the number of periods and days (same as current year); this information can be modified if necessary AFTER the current master schedule has been copied. Once you click **Continue**, you will see this screen below.

Automatic Schedule Setup - Schedule Term Selection

- **Check the boxes** to select each term needed on the this screen. (If you have quarters, Trimester terms will automatically appear. No need to check Trimesters unless you have trimester classes on the Live side, Current Year. Click **Continue**).

Automatic Schedule Setup - Define Term Dates

Term	Abbreviation	First Day of Term	Last Day of Term
Full Year	FY (MM/DD/YYYY)	8/19/2015	5/26/2016
Semester 1	S1 (MM/DD/YYYY)	8/19/2015	1/3/2016
Semester 2	S2 (MM/DD/YYYY)	1/4/2016	5/26/2016
Quarter 1	Q1 (MM/DD/YYYY)	8/19/2015	10/19/2015
Quarter 2	Q2 (MM/DD/YYYY)	10/20/2015	1/3/2016
Quarter 3	Q3 (MM/DD/YYYY)	1/4/2016	3/20/2016
Quarter 4	Q4 (MM/DD/YYYY)	3/21/2016	5/26/2016

[Continue](#)

- Enter the first and last day of the school year. Click **Continue**.

- **Set the RADIO BUTTON to “Load Only”**, enter a Build description, verify the number of terms, periods, and days. Scroll to bottom of page and click **Submit**. (The Catalog field will probably be blank. Not a problem at this point.

10. ____ **On the next screen, select the new scenario by clicking on the scenario name.**
- Now you should see a course catalog populated. For those that do not see a course catalog option, select the new catalog from the drop-down list, then Click **SUBMIT**.
 - Note, if the new catalog is not available in the list, go to **Course Catalogs** and click **“New”**. Enter a Name and Description (Name should reflect the next school year). Click Submit.)

Example:

New Course Catalog

Catalog	Value
Name	<input type="text" value="2015-2016 Course Catalog"/>
Description (80 character limit)	<input type="text" value="2015-2016 Course Catalog"/>

Then click on your Scenario name, make sure the Catalog field is populated with your newly created catalog, and click **Submit**.

11. ____ **Update/Correct Years and Terms: PowerScheduler > Years and Terms**

Year	Abbrev.	1st Day	Last Day	Edit Terms
2013-2014 School Year	13-14	08/27/2013	06/06/2014	Edit Terms
2014-2015 School Year	14-15	09/03/2014	06/05/2015	Edit Terms
Full Year	FY	08/19/2015	05/26/2016	Edit Terms

- You will notice that the “Year” name is “Full Year”, and it should be “2015-2016” with Abbrev. = “15-16”. Click on the **“Full Year”** name link and modify these fields.

Edit Schedule School Year

Option	Value
Name of School Year	<input type="text" value="2015-2016"/> (example: 2000-2001)
Abbreviation	<input type="text" value="15-16"/> (example: 00-01)
First Day of School	<input type="text" value="08/19/2015"/> (MM/DD/YYYY)
Last Day of School	<input type="text" value="05/26/2016"/> (MM/DD/YYYY)

Now click on the **Edit Terms** button for the new school year term, then starting at the top, with the full year term, click on the blue link, confirm that the dates are correct, and populate the **Import File Term #** (the correct value appears beneath the box):

Option	Value
Name of Term	2015-2016
Abbreviation	15-16 (example: Q1) Note: This abbreviation must start with a letter. Do not use a number by itself.
First Day of Term	08/19/2015 (MM/DD/YYYY)
Last Day of Term	05/26/2016 (MM/DD/YYYY)
What portion of the school year does this term represent?	Full year
Import File Term #	2500 2500

Delete Submit

Click **Submit**.

12. ___ Set Schedule Year: PowerScheduler > Functions > Set Schedule Year

Set Schedule Year

Sets the schedule year used for scheduling requests.

Years

Submit

13. ___ Copy Current Master Schedule: PowerScheduler > Functions > Copy Master Schedule:

Copy Master Schedule

This function will replace the following information in the scheduling area

1. Years and terms from the selected year into the scheduling area.
2. Periods from school setup into the scheduling area.
3. The entire Master Schedule from the selected year into the scheduling area.

Option	Value
School	Crestwood Elementary
Source year (the school year that the Master Schedule is being copied from)	2014-2015 School Year
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

- Select the Source Year of **2014-2015**, and check the “**Confirm to proceed**” box, and click **Submit**.

14. ____ **Copying a Master Schedule causes the Years and Terms to be changed** (Known issue) Workaround = manually correct the years and terms.) **(NOTE: This was resolved in PowerSchool vs. 8.3, so if your server is on vs. 8.3 or higher, you may skip steps 14 & 15.)**

- PowerScheduler > Years and Terms > Click on Edit Terms.
- Edit each term and make any necessary changes—including re-populating the Import File Term #.

15. ____ **Associate the Terms on the New Scenario:**

Click **Scenarios** > Select the active scenario > Click ‘**Associate**’ box next to “Terms”.



Check the box next to each term; then click Submit.

Schedule Term Setup



Check all boxes, even if you have no classes that meet for just a semester or quarter.

Note: You will be returned to the first Edit Scenario page; now click **Submit** again!

16. ____ **Add new Courses – Optional**

- Switch to the **District Office** to add a new course for next year. (NOTE: Be sure that the Full Year “Term” has been created in the District Office for next year.)
- **District > Courses > New Course** (be sure the course number is unique)
- Use the “**Availability**” tab to activate this course for your school for **next year**.
- ____ **Course Catalog:** Switch back to your school. Go to: **PowerScheduler > Catalogs > Edit Catalog** > View Master Course List
- Scroll to the newly created course and check the box to activate this course.

17. ____ **Update Course “schedule this course” check box – REQUIRED!**

- Select “Functions” from bottom left of the PowerScheduler menu.
- Select “Auto Fill Course Information”.
- You will only update one field and submit as per screen shot below. **UPDATE THE SCHEDULE THIS COURSE DROP DOWN CHOICE, SET TO YES!**

Field Name	Value
Schedule This Course	Yes
Department	<input type="text"/> Associate

Clear Value

Build Type: No Change

18. ____ **Run Master Schedule Report(s):** Choose from 4 reports:

- Select “Master Schedule” from the PowerSchedule menu
- Select “Reports” from the PowerScheduler menu, then select the Master Schedule (same as above, different way to get there), Master Schedule (PDF), or Master Schedule List.
- Optional: Print copy of Master Schedule.

19. ____ **Adjust the Master Schedule – Optional**

- **PowerScheduler > Sections** > Click on the Course Name for which you want to adjust a section. OR:
- **PowerScheduler > Courses > Sections tab.**
- Click the specific section number to be adjusted, or click NEW to add a section.
 - Edit the Schedule (Expression), Teacher, Room, Maximum Enrollment, etc.
- To add a new section, the following fields are required:
 - Term
 - Expression
 - Teacher
 - Room
 - Section Number
 - Close Section at Max
 - Maximum Enrollment
- To Delete a section, click on ‘Delete’ at bottom of Edit Section page.

20. ____ Close Section at Max checkbox: On each section, there is a checkbox called “Close Section at Max”, which if checked, results in a warning when the maximum enrollment has been exceeded. If you wish to utilize this feature, you will want to mass-check this box (the copy master schedule function leaves this box un-checked regardless of the setting on the source sections). To update this field for all sections, here are the steps:

- ____ Get your BuildID that identifies your new scenario:
- **PowerScheduler > Functions > Update Selections**; then select the “**ScheduleBuilds**” table. Click on “**Select All ____ Records in this Table**”.

Update Selections

Click on “**List View**”, look for the new scenario name, and record the BuildID shown. In the **example** below, the BuildID is “401”:

Build: 2015 - 2016 Catalog: 2015-2016 Course Catalog

Records: 3

	BuildID	BuildName	DateLastBuild	DateLastLoad	StudentsWithRequests	StudentsScheduled
1.	251	2013 - 2014	0/0/0	0/0/0	0	0
2.	351	2014 - 2015	0/0/0	0/0/0	0	0
3.	401	2015 - 2016	0/0/0	0/0/0	0	0

Now click on “**Scheduling Functions**” in your breadcrumbs.

Select “**Update Selections**”.

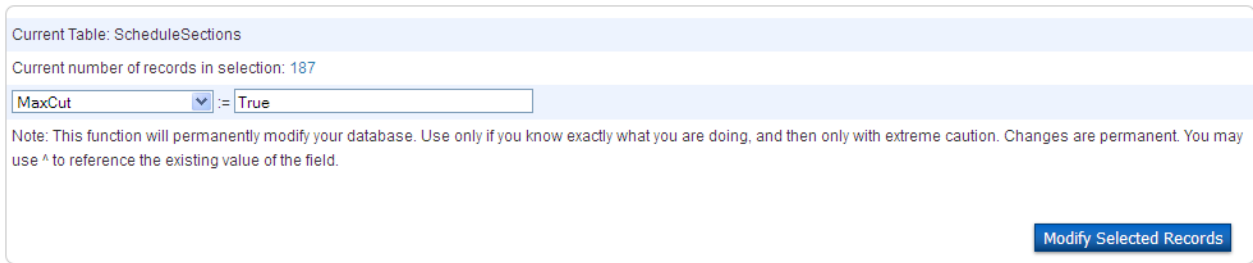
Change the Current Table to “**ScheduleSections**”.

Select the records that match your BuildID by selecting the ‘BuildID’ field under “Search Schedule Sections”. Enter your BuildID in the box to the right. Click on “Search all ____ records in this school”.

The number of matching records will be displayed.

Click on “**Modify Records**”.

Select the “MaxCut” field, enter “True” in the box to the right, and click on ‘Modify Selected Records’.



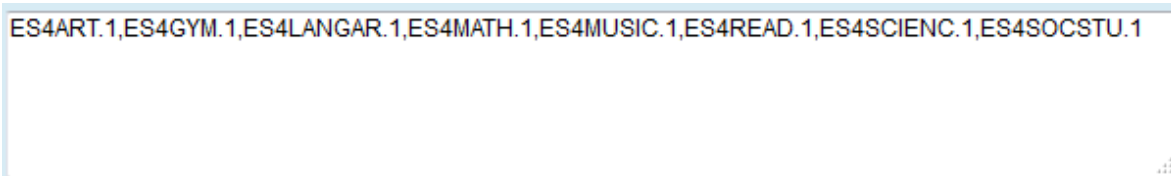
Current Table: ScheduleSections
Current number of records in selection: 187
MaxCut := True
Note: This function will permanently modify your database. Use only if you know exactly what you are doing, and then only with extreme caution. Changes are permanent. You may use ^ to reference the existing value of the field.
Modify Selected Records

21. ____ Dependent Sections: If you are using “Dependent Sections”, verify that the Dependent Sections box on the “Homeroom” sections is populated correctly, especially for any new sections of the “Homeroom” course.

Path: PowerScheduler > Sections > select the “Homeroom” course (or whichever is considered to be the home-base). Click on a section number to open the Edit Section page. Scroll down to the Dependent Sections box.

TIP: A suggestion is to open MS Word or Notepad, type your string of course.sections separated by commas, then copy/paste the information from Word into this box.

TIP: To make the information inside the box easier to read, place your mouse pointer in the lower right-hand corner of the box, and when you see a small arrow, drag to the right. This will “unwrap” the text string. Here is a sample:




ES4ART.1,ES4GYM.1,ES4LANGAR.1,ES4MATH.1,ES4MUSIC.1,ES4READ.1,ES4SCIENC.1,ES4SOCSTU.1

Be careful to not put spaces after commas, and make sure it is the exact course and section number using this format: course.section,course.section

NOTE: All sections listed inside the Dependent Sections box must EXIST in your Sections table.

22. ____ Use “Schedule Mass Enroll” function to enroll students into the appropriate Homeroom.

- PowerScheduler > Students > (select a grade level) > Select Students by Hand > Use the CTRL-Click method to select students.





 [View Field List](#)
[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)
 Next Year Grade Level: [3](#) [4](#) [5](#)
 Current Year Grade Level: [2](#) [3](#) [4](#) [5](#)
 Other Options: [M](#) [F](#) [All](#) [Current Selection \(286\)](#)

Click on a value using the filters shown, then click on **Select Students by Hand** and select those students within this group to be enrolled in a course-section.

Once your students are selected, click on **Functions**. Select **Schedule Mass Enroll**

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?

OR

 (course.section)

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

TIP: If you select a group of students in PowerScheduler, then leave that page, when you click back on the “Students” link, you will no longer see the Functions button. To get the Functions button back, change your URL by removing characters to the right of /Students and add: **functions.html**

Ex: <http://training3.ps.nwoca.org/admin/PowerSchedule/Students/functions.html>

23. ____ Verify Enrollment

- a. **PowerScheduler** > **Students** (the Current Selection should still be the group you just enrolled in a class)
- Choose “Schedule” in the box at the top of the list of students.
 - Click on a student name to view that student’s schedule

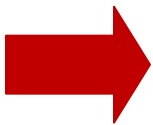
24. ____ (Optional) To Print Future Student Schedules:

- If you need to print schedules for next year’s classes, use this procedure:
- Check your schedule report which can be found by following this path:

Live Side > System Reports > Setup tab > Report Cards > select your named student schedule report and you will see something like this:

Report Card

Option	Value
Template Name	<input type="text"/>
Printed Report Title	<input type="text"/>
Title Style	Helv
Title Justification	Cent
Heading	
Schedule Listing	
Footer	
This report available to	<input checked="" type="radio"/> us <input type="radio"/> on
Teachers can print?	<input type="checkbox"/> ye



Click on the blue “**Schedule Listing**” icon and you will see this image below. YOU MUST CHECK THE BOX associated with the listing “use future schedule (student’s schedule for next year)”

Option	Value
Column Title Style	Helvetica 10 (B) ▾
Class Listings Style	Helvetica 9/18 ▾
Use Future Schedule (student’s schedule for next year)	<input type="checkbox"/>