

# PowerScheduler – **Load Only** Copy Master Schedule from Current School Year

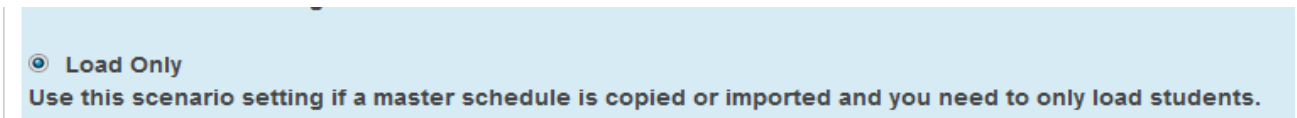
Did you complete the Prepare to Build Worksheet? If not, **please do NOT continue** with this document. Please contact NWOCA support staff for instruction.

With Load Only you will accomplish the following:

- Copy Schedule from current school year
- Verify & Setup Courses
- Add/Delete Sections
- Add/Delete Teachers
- Validate Load – without students
- Load Students
- Evaluate Schedule
- Make Adjustments – Manually – to schedule

## Instructions:

1. Click on Scenarios > Build Scenario (blue hyperlink) to verify “**Load Only**” is selected.  
Example:



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

| Option  | Value                    |
|---|--------------------------|
| School  | Evergreen High School    |
| Source year (the school year that the Master Schedule is being copied from) | 2018-2019                |
| Clear existing scheduling terms in the destination school year              | <input type="checkbox"/> |
| Check here to confirm you want to proceed.                                  | <input type="checkbox"/> |

**Submit**

- a. **Select** the Source Year, Check the “**Confirm to proceed**” box, and click **Submit**.
- b. **To view copied schedule: PowerScheduler > Master Schedule > All Periods > All Days > All Rooms > All Teachers > Submit.**

### 3. Add new Courses – Only if needed.

- a. At the **District Office** add new course(s). **District > Courses > New Course** (**Course numbers cannot be re-used.**) **Add course information > Submit.**
- b. **In your Building...PowerScheduler > Course Catalogs > Edit Course 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**".

The next two steps involve setting up your courses for the new school year. You can make the changes individually (Step 4) or in mass (all courses) (Step 5a) or in groups (Step 5b/c). Please read through each step before you decide which step to follow. You may use a combination of the three steps.

At a minimum, we recommend you set the following:

- a. Check: Schedule This Course
- b. Set: Maximum Enrollment
- c. Check: Close Section After Max
- d. Load Priority (Optional) – set all to 7. As needed, you will change individually to 1, 3, 7, 15, 31, and 63 depending on the loading of students into sections by PowerScheduler. You will do this step manually after the Load Validate which is step 13.
- e. Optional Options: Elective/Academic and Teams if you have them.

**4. Course Preferences:** PowerScheduler > Courses > Select a Course > Mark page as needed > Submit.

Start Page > PowerScheduler > Course Information

### Course Information

Build: 2016 - 2017 Catalog: 2016-2017 Course Catalog

Constraints Preferences Relationships Requests Sections

#### General Information

|                             |                                |
|-----------------------------|--------------------------------|
| Course Number               | 6LA                            |
| Course Name                 | 6 Language Arts                |
| Course Description          | <input type="text"/>           |
| Course Credit Hours         | 1                              |
| Request Screen Credit Hours | <input type="text" value="1"/> |
| Credit Type                 | ENG                            |
| Alternate Course Number     |                                |
| Grade Scale                 |                                |
| CIP Code                    |                                |
| Vocational Class            | No                             |

#### Scheduling Preferences

|                          |                                |  |
|--------------------------|--------------------------------|--|
| Schedule This Course     | <input type="checkbox"/>       |  |
| Use The Course For Lunch | <input type="checkbox"/>       |  |
| Department               | <input type="text"/>           | <input type="button" value="Associate"/> |
| Maximum Enrollment       | <input type="text" value="0"/> |  |

#### Sections Defined

|  |                                |  |
|--|--------------------------------|--|
| Target Number of Sections to Offer       | <input type="text" value="0"/> |  |
| Number of Teacher Assignments            | 0                              |  |
| Periods Per Cycle                        | 0                              |  |
| Periods Per Meeting                      | <input type="text" value="0"/> |  |
| Frequency                                | <input type="text" value="0"/> |  |
| Terms per year                           | 0 of 2                         |  |
| Allow Student Repeats in the Same Term   | <input type="checkbox"/>       |  |
| Allow Student Repeats in Different Terms | <input type="checkbox"/>       |  |
| Valid Terms                              | <input type="text"/>           | <input type="button" value="Associate"/> |

#### Labs Defined

|                         |                                |
|-------------------------|--------------------------------|
| Is This Course A Lab    | <input type="checkbox"/>       |
| Lab Frequency           | <input type="text" value="0"/> |
| Lab Periods Per Meeting | <input type="text" value="0"/> |

#### Load Options

|                           |                                |  |
|---------------------------|--------------------------------|--|
| Load Priority             | <input type="text" value="0"/> |  |
| Load Type                 | Academic                       |  |
| Balance Priority          | Section                        |  |
| Use Pre Established Teams | <input type="checkbox"/>       |  |
| Close Section After Max   | <input type="checkbox"/>       |  |
| Use Section Types         | <input type="checkbox"/>       |  |

#### Substitute Information

|                                   |                          |  |
|-----------------------------------|--------------------------|--|
| Don't Allow Student Substitutions | <input type="checkbox"/> |  |
| Global Substitution 1             | <input type="text"/>     | <input type="button" value="Associate"/> |
| Global Substitution 2             | <input type="text"/>     | <input type="button" value="Associate"/> |
| Global Substitution 3             | <input type="text"/>     | <input type="button" value="Associate"/> |

## 5. Auto Fill Course Information.

- a. **Functions > Auto Fill Course Information** > Apply to all Courses in the active catalog > Make Changes > Submit.
- b. To select a group of courses, use Update Selections > Current Table: **ScheduleCourseCatalogs** > CourseCatalogID = XXXX > Search all XXXX records in this school > Select Courses By Hand > Choose Courses > Click Submit.



- c. Now click on “Scheduling Functions” in your bread crumbs and choose “Auto-Fill Course Information”. Make sure the “Apply to” option is set to “the selected \_\_\_ courses”.

## 6. Adjust the Master Schedule if necessary:

- a. **PowerScheduler > Master Schedule** (matrix view) > Click on the Course Name. Make adjustment to 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.
  - **New this year: No Section number can end in a ZERO. Example: 10, 20, 30...**
- c. To **Delete** a section, click on ‘Delete’ at bottom of Edit Section page.

## 7. How 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
  - Select the Teacher
  - Section Number – cannot end in zero
  - Maximum Enrollment
  - Period/Day(s)
  - Room (Associate)
  - Check Close Section at Max

- 8. Teams** – Optional. If any of your sections last year had a “Team” designation, you will need to add the Team to the new years’ **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).

- 9. Add Course Relationships** where needed.

The **Course Relationships** screen is used to set up relationships to fill specific requirements that must be met when building a master schedule and loading students into that schedule.

The relationship screen asks for up to three pieces of data:

1. The associated course you want to relate to
2. The Relationship Type
3. The Relationship Code – you only use this one when the Relationship type is “Is Blocked For Building With”. You do NOT use it for any of the others.

These requirements might include the following:

1. One teacher teaches two subjects at the same time. ( Either Block Combine or Block Simultaneous with a Concurrent)
2. There is a 2 semester course sequence for the students and the students must stay with the same students on the same period on both semesters with the same teacher. (Block Term)
3. Students are taking 2 courses during the same term and the school wants the students to travel together through both sections. (Block Section)
4. Two courses need to be built on opposite days during the same period. (Block Opposite Days)
5. Students have signed up for 2 courses that must be taken in sequence and offerings of both classes are running during both terms. Not all students sign up for both classes but those that do cannot get them in the wrong order. (Prereq)
6. Students sign up for 2 courses that must be taken in the same semester, but not in the same period. (Coreq)
7. Students sign up for 2 courses that cannot be in the same term but it does not matter which comes first. (Not Coreq)
8. Two courses must run back to back in the day, meaning consecutive periods. (Block Before or After)

| Relationship Type                               | Relationship Code | Purpose  | Used by Build | Used by Load |
|---|-------------------|--|---------------|--------------|
| Is <b>Blocked</b> for <b>Building</b> With      | Simultaneous      | Two courses <u>must</u> be taught at the same time; can be two different teachers; can be a different number of sections   | Yes           | No           |
|   | Combine           | Two courses taught at the same time with the same teacher; course setup on both courses must be identical  | Yes           | No           |
|   | Different Terms   | Two courses scheduled in same period, different terms, same students, same teacher for each section  | Yes           | Yes          |
|   | Before/After      | Two courses scheduled in consecutive periods   | Yes           | Yes          |
|   | Opposite Days     | Two courses scheduled in same period, opposite days  | Yes           | Yes          |
|   | Section           | Two courses in same term, same students  | Yes           | Yes          |
| May be <b>Built</b> Concurrent With             | N/A               | Two courses taught by same teacher <u>can</u> be at the same time; use with a Block Simultaneous for 1 teacher who <u>must</u> teach two courses at one time (2 relationships) | Yes           | No           |
| Has a <b>Load</b> Coreq of                      | N/A               | The associated course must appear in the same term in the student's schedule as the course where you are putting the relationship  | No            | Yes          |
| Has a <b>Load</b> Postreq of                    | N/A               | The associated course must appear in a subsequent term in the student's schedule   | No            | Yes          |
| Has a <b>Load</b> Prereq of                     | N/A               | The associated course must appear in a prior term in the student's schedule  | No            | Yes          |
| Must not <b>Load</b> Coreq with                 | N/A               | The associated course must not appear in the same term in the student's schedule as the course where you are putting the relationship  | No            | Yes          |
| Must <b>Load</b> Distinct(no term overlap) with | N/A               | The associated course must not appear in any overlapping term in the student's schedule as the course where you are putting the relationship                                   | No            | Yes          |
| Must <b>Load</b> the Term After                 | N/A               | The associated course must appear in the next term in the student's schedule as the course where you are putting the relationship (Q1,Q2) (Q2,Q3) (T1,T2),etc                  | No            | Yes          |
| Must <b>Load</b> the Term Before                | N/A               | The associated course must appear in the term before in the student's schedule as the course where you are putting the relationship  | No            | Yes          |

**10. Add new teachers (Live Side).** Use the Scheduling Setup page to set the following fields:

- a. Schedule This Teacher
- b. Department
- c. Preferred Room

**11. Define Teacher Information** as needed.

- a. Review every teacher. Do you have new teachers since last year? Do you have non-returning teachers?
- b. May use **Auto Fill Teacher Information** to set some info, such as Schedule This Teacher & Maximum Consecutive Periods. **PowerScheduler > Functions > Auto Fill Teacher Information.**
- c. **For individual Teachers:** Select **Teachers** in **PowerScheduler > Preferences.**
- d. **For groups of teachers:** To select Teachers by hand: Functions > Update Selections > Teachers table > Search Teachers: (First drop-down) > Select those where the "Sched\_Scheduled" field = 1. Click on "Search all XXX records in this School" then click on "Select Records by Hand". Make your selections. Press Submit. Click on "Scheduling Functions" in your bread crumbs and choose Return to Functions and choose "Auto Fill Teacher Information". Make sure the "Apply to" option is set to "the selected \_\_\_ teachers." Using your selection from the previous step, you can assign department, consecutive periods, etc.

## 12. Load Constraints add as needed.

### Load Constraints

Load constraints restrict the way PowerScheduler loads students into courses in the master schedule.

PowerSchool includes six types of definable load constraints. Each type constrains student schedules in a specific way.

**Note:** Since constraints restrict student schedules, the more constraints you define, the less flexibility the system has to load students into courses and the less optimal the resulting schedule will be. It is always best to use the fewest number of constraints required to accomplish your scheduling goals.

#### Start Page > PowerScheduler > Constraints > Load Constraints

Balance Adjustment – Pre-load a section with n students before calculating assigned.

Student/Student Avoid – Keep two students from being scheduled together.

Student/Teacher Avoid – Keep an individual student and teacher from being scheduled together.

Student Fee – Schedule a free period for a student.

Section Link – Link the sections of two courses with the same students.

Student Preference – Force a student to schedule in a specific teacher's section.

### How to Add a Balance Adjustment Constraint

Use a Balance Adjustment constraint to pre-load a course section with a certain number of reserved seats before adding the rest of the students. For example, use this constraint if you have a math class that needs five seats open for SPED students.

1. On the start page, choose **PowerScheduler** from the main menu. The Scheduling page appears.
2. Under Resources, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Load Constraints, choose **Balance Adjustment**. The Balance Adjustment Constraints page appears.
4. Click **New**. The Edit Balance Adjustment Constraint page appears.
5. Use the following table to enter information in the fields:

| Field                    | Description   |
|--------------------------|---|
| Course Number            | Click <b>Associate</b> to select the name of the course you want to balance.                |
| Section Number           | Enter the section number of the selected course that you want to balance.                   |
| Teacher                  | Click <b>Associate</b> to select the name of the teacher who instructs this course section. |
| Number of Reserved Seats | Enter the number of seats to be held.   |

6. **Note:** You must either enter a section number or select a teacher.
7. Click **Submit**. The Balance Adjustment Constraints page appears.

## How to Add a Student/Student Avoid Constraint

Use a Student/Student Avoid constraint to specify that two selected students cannot be scheduled into any of the same course sections.

1. On the start page, choose **PowerScheduler** from the main menu. The Scheduling page appears.
2. Under Resources, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Load Constraints, choose **Student Avoid**. The Student/Student Avoid Constraints page appears.
4. Click **New**. The Edit Student/Student Avoid Constraint page appears.
5. Use the following table to enter information in the fields:

| Field     | Description   |
|-----------|---|
| Student 1 | Click <b>Associate</b> to select the name of one of the students you want to separate from one another. |
| Student 2 | Click <b>Associate</b> to select the name of the other student.   |

6. Click **Submit**. The Student/Student Avoid Constraints page appears.

## How to Add a Student/Teacher Avoid Constraint

Use a Student/Teacher Avoid constraint to specify that this student and this teacher cannot be scheduled into any of the same course sections.

1. On the start page, choose **PowerScheduler** from the main menu. The Scheduling page appears.
2. Under Resources, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Load Constraints, choose **Teacher Avoid**. The Student/Teacher Avoid Constraints page appears.
4. Click **New**. The Edit Student/Teacher Avoid Constraint page appears.
5. Use the following table to enter information in the fields:

| Field   | Description  |
|---------|--|
| Student | Click <b>Associate</b> to select the name of the student you want to avoid scheduling with a selected teacher.   |
| Teacher | Click <b>Associate</b> to select the name of the teacher you want to avoid scheduling with the selected student. |

6. Click **Submit**. The Student/Teacher Avoid Constraints page appears.

## How to Add a Student Free Constraint

Use a Student Free constraint to specify those periods when a student must be free, such as when taking a course at another school.

1. On the start page, choose **PowerScheduler** from the main menu. The Scheduling page appears.
2. Under Resources, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Load Constraints, choose **Student Free**. The Student Free Constraints page appears.



4. Click **New**. The Edit Student Free Constraint page appears.
5. Use the following table to enter information in the fields:

| Field    | Description  |
|----------|--|
| Student  | Click <b>Associate</b> to select the name of the student who needs to have a free periods.                         |
| Term     | Choose from the pop-up menu the term in which this student needs free periods.                                     |
| Schedule | Select the checkbox next to each period in each day that you want to schedule this student to have a free periods. |

6. Click **Submit**. The Student Free Constraints page appears.

## How to Add a Section Link Constraint

Use a Section Link constraint to specify that if students are enrolled in one course section, they must also be enrolled in another, specific course section.

1. On the start page, choose **PowerScheduler** from the main menu. The Scheduling page appears.
2. Under Resources, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Load Constraints, choose **Section Link**. The Section Link Constraints page appears.
4. Click **New**. The Edit Section Link Constraint page appears.
5. Use the following table to enter information in the fields:

| Field            | Description   |
|------------------|---|
| Course Number 1  | Click <b>Associate</b> to select the name of one of the courses for which you want to link a section.                                   |
| Section Number 1 | Enter the section number of the course in the Course Number 1 field that you want to link to another course section.                    |
| Course Number 2  | Click <b>Associate</b> to select the name of the other course for which you want to link a section.                                     |
| Section Number 2 | Enter the section number of the course in the Course Number 2 field that you want to link to the section in the Section Number 1 field. |

6. Click **Submit**. The Section Link Constraints page appears.

## How to Add a Student Preference Constraint

*Use a Student Preference constraint to schedule a student into a particular course section, term, or teacher.*

1. On the start page, choose **PowerScheduler** from the main menu. The Scheduling page appears.
2. Under Resources, choose **Constraints** from the PowerScheduler menu. The Constraints menu appears.
3. Under Load Constraints, choose **Student Preference**. The Student Preference Constraints page appears.
4. Click **New**. The Edit Student Preference Constraint page appears.
5. Use the following table to enter information in the fields:

| Field          | Description  |
|----------------|--|
| Student        | Click <b>Associate</b> to select the name of the student you want to force to schedule in a specific course section. |
| Course Number  | Click <b>Associate</b> to select the name of the course.   |
| Term           | Choose the term to which you want this constraint to apply from the pop-up menu (optional).                          |
| Section Number | Enter the section number of the course into which you want the student to be scheduled (optional).                   |
| Teacher        | Click <b>Associate</b> to select the name of the teacher who instructs this course section (optional).               |

6. **Note:** Though the last three fields are optional, you must make a selection for at least one of the fields.
7. Click **Submit**. The Student Preference Constraints page appears.

**Note:** To view a list of load constraints and the number of each that have been defined for your schedule, choose Load Constraints from the constraints menu.

## Constraint Codes

### Load Constraints – Note: Student Avoid and Teacher Avoid have the same code#

- 05 = Student/Teacher Avoid
- 05 = Student Preference
- 6 = Student Free
- 7 = Student/Student Avoid
- 20 = Balance Adjustment
- 92 = Section Link

**13. Load Validate:** Validate Data until Error Free (**Load – select Validate Only**) Check the “Close Sections at Maximum” box. Click the “Q” next to “Load” to view the results. Correct any validation errors. (Leave warnings.)

- a. If you wish to load only certain grade levels, **select the students before** running the load, then select “Reschedule the \_\_\_\_\_ selected students” box.

Start Page > PowerScheduler > Load Schedules

## Load Schedules

Build: 2016 - 2017 Catalog: 2016-2017 Course Catalog

| Validate  |   |
|---|---|
| <b>Validate only</b><br>(Performs only a validation of the scheduling data for loading)   | <input type="checkbox"/>  |
| Load  |   |
| <b>Load type</b><br>(Student schedules may be loaded from scratch. Existing schedules may be balanced or students that have already been loaded may be rescheduled) | <input checked="" type="radio"/> Load all students<br><input type="radio"/> Balance<br><input type="radio"/> Reschedule the selected 0 students |
| Close sections at maximum   | <input type="checkbox"/>  |
| Use global course substitutes (see Course Preferences)  | <input type="checkbox"/>  |
| Use student course substitutes (see Requests)   | <input type="checkbox"/>  |

**Execute**

**14. Load Students.** Re-Run the Load > uncheck “Validate Only”. Check the “Close Sections at Maximum” box. Click the “Q” next to “Load” to view results/percentage of successfully scheduled students.

**15. Import Results.** Click on the “Q” beside “Load”, then **CLICK ONCE** on “Import”. Wait for process to complete.

**16. Evaluate the Load** using Post Load Reports: **(suggested reports are highlighted)**

- a. Master Schedule List
- b. Schedule Course Enrollment (used to manipulate student’s schedules)
- 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

**17. Manually adjust student schedules** after all loading is complete. Do not load again or all your work will be deleted.

**18. 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?**

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.

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

2958.2  (course.section)

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

19. To Print Future Student Schedules prior to the EOY process:

- 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"/>                          |

**COMMIT THE SCHEDULE**

20. 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 **match exactly** 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.

### **Miscellaneous**

Load Only – Situation: Copied Master Schedule but some sections copied which are not needed for next year.

1. Delete Sections: if you can't find them because it says "unknown course" – temporarily add course to course catalog – delete sections, THEN remove from course catalog.
2. Remove course from course catalog and/or uncheck schedule this course.