

PowerScheduler – Build & Load

1. **Note:** This document assumes you have already completed the “Prepare To Build” steps.
2. **Find the internal ID’s for your Active Build and Course Catalog:**
 - 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.
3. **Enter Course Preferences:** At a minimum the following course fields must be set:
 - a. Select “Schedule This Course”
 - b. Department (optional, but recommended)
 - c. Build Type (Default is “Standard”, but may need “Lab” or “Lab Float”)
 - d. Maximum Enrollment (In each *section* of the course)
 - e. Periods Per Meeting (unless the course meets for a double period, normally ‘1’)
 - f. Frequency (refers to number of days the course meets during your cycle)
 - g. Valid Start Periods
 - h. Valid Terms (click “Associate”)
 - i. Load Type (Academic, Elective, or Alternate)
 - j. Close Section After Max – Check this box
4. May use **Auto Fill Course Information**. (Found in “**Functions**”)
 - a. To select a group of courses, use Update Selections > **ScheduleCourseCatalogs** > Select records that match your catalogID > Select Courses By Hand > Click Submit.
 - b. 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”.
5. Add **Course Relationships** where needed. Most commonly used build relationships are:
 - a. Block for Building With:
 - Different Terms
 - Simultaneous
 - See **Relationships Handout** for additional relationships

6. Teacher Information

- a. May use **Auto Fill Teacher Information** to set some info, such as Schedule This Teacher & Maximum Consecutive Periods. PowerScheduler > Functions > Auto Fill Teacher Information.
- b. For individual Teachers: Select Teachers in PowerScheduler > Preferences.
- c. For groups of teachers:. To select Teachers by hand: Update Selections > Teachers table> Select those where the “Sched_Scheduled” field = 1. Click on “Select Records by Hand”. Make your selections. Return to Update Selections; select “Auto Fill Teacher Information”. Select the option to update for “The Selected ___ Records”.

7. Create Course Assignments: Teacher Assignments for Courses

- a. Courses > Assignments tab (*Can also create assignments on the teacher screen*)
 - Click “Associate” to select a teacher
 - Enter the number of sections for this teacher
 - If course can meet either term(s), you may want to designate how many sections this teacher should have for a specific term. (add multiple assignments)

8. Add **Build Constraints** as needed. The most commonly used Build Constraints are:

- a. Teacher Free: Select the Term/Day/Period(s) for when a teacher must be free.
- b. Teacher Part-time: The starting/ending periods when a teacher IS AVAILABLE.
- c. Pre-Schedule: Schedules a section ahead of time for a specific term/period/day

9. 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.

10. **Course Rank**. PowerScheduler > Course Rank > Build Rank

- a. Recommend running a Build/Validate at least once using system-assigned rank. (*After the system builds the initial rank, you can make manual adjustments.*)
- b. If “Build Rank” button is clicked after manual adjustments are made, manually assigned ranks will be lost. Use “Build Rank” button again if courses were added or removed.
- c. Click “Update Rank” if the number of sections, course requests, or constraints have changed. (Manual rank changes are not lost.)

11. **Build Master Schedule**:

- a. PowerScheduler > **Build** > Select “**Validate only**”
- b. Click “**Q**” beside “Build” to view results. Click “**View**” under “Results Log”.
- c. Make corrections & re-run the Validate. Check results.
- d. Once the Validate completes successfully, run the Build again; Click “Q”, then “View” under “Results Log”. Correct any errors & Re-Run the Build.

12. Import Master Schedule:

- a. Once the Build is error-free, click “**Q**”, then “**Import**”. Recommend that you select “Master Schedule” only.

13. Load Constraints:

- a. Enter any of the constraints that control the load as needed. See handout.

14. Fix Section Links:

- a. If you had any Course Relationships set up with Relationship Type = “Is Blocked For Building With”, and Relationship Code = “Different Terms”, you must follow the steps on the handout for “Fixing Section Links Created by the Build”. (Section links created from the PowerScheduler > Constraints > Section Links page do not need to be fixed.

15. Load Students.

- a. PowerScheduler > Load > check “Validate Only” & check “Close Sections at Max”.
- b. View the results: Click on the “Q” next to “Load”, then on “View” under “Results Log”. To view errors & messages produced by the Load, click “View” under Load Log.
- c. Once the Validate runs successfully, Run the Load again without checking Validate Only; you may wish to check the “Close Sections at Maximum” box.
- d. View the results of the load per the instructions above.

16. Import Results – Remember to Import after each new build.

- a. Once the Load has completed successfully, click on the “Q” next to “Load”, then click on “Import” under “Results”.

17. Evaluate the Load using Post Load Reports:

- a. Master Schedule List
- b. Schedule Course Enrollment
- c. Schedule Results by Grade
- d. Student Schedule List
- e. Room Utilization
- f. Student Schedule Report
- g. Non-Scheduled Student Requests for Scheduled Courses
- h. Individual Student Conflict Matrix

- 18. **Manually adjust student schedules** after all electronic loading is complete.
- 19. **Manually Enroll Students – Optional – Only after you are done running Loads.**
 - 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
Export Using Template	Uses a template to export data on currently selected students.
List Students	Prints a quick list of currently selected students.
Mass Add Requests	Lets you enter the same course request for selected student at one time.
Mass Delete Requests	Lets you delete the same course request for selected students at one time.
Next School Indicator	Sets the next school indicator for currently selected students.
Print Reports	Prints reports for currently selected students.
Print Mailing Labels	Prints mailing labels for currently selected students.
Quick Export	Exports data on currently selected students.
Reports Menu	Goes to the Reports menu.
Schedule Mass Enroll	Enrolls currently selected students in a section.
Schedule Reports Menu	Goes to the scheduling reports menu.
Work with these students	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.

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.

20. 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 <i>Style</i>	Helvetica 10 (B) ▾
Class Listings <i>Style</i>	Helvetica 10/12 ▾
Use Future Schedule (student's schedule for next year)	<input type="checkbox"/>

21. 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:

- i. Feel free to contact NWOCA’s Student Services department for assistance with the Commit.
- ii. Create Years and Terms on the Live Side for the next school year. School > Years and Terms > New.
- iii. 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!)
- iv. Make sure that the “Days” on the Live Side have the same “Name” and “Abbreviation” as in PowerScheduler.
 1. Live side: **School > Days**
 2. PowerScheduler side: **PowerScheduler > Days**
- v. PowerScheduler > **Commit**