

PowerScheduler Prepare to Build Instructions School Year 2017-2018

Step 1. Years And Terms – Must be done before completing any of the other instructions.

- **District Office** - Set up the Full Year in District Office. This is the only term needed.
- **Your Building** – Create all the terms – No gaps. (Full Year, Semesters, Quarters...)
- **Feeder School(s)** – Create full year term in your feeder building which allows students to enter their course requests.

Step 2. Click on **PowerScheduler** in the School where the students will be scheduled. (Bottom left from start screen.)

- 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.

Submit

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

(FYI...If you use NWOCA's computer, you may need to download the Scheduling Engine on your own computer.)

Step 3. Click on **AutoScheduler Setup**. – (Multiple screens are included in this section.)

Define the Lowest Term Level, Number of Periods, and Number of Days. **“Continue”**.

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

Continue

Automatic Schedule Setup - Define Term Dates

Full Year (FY)		
First Day of Term	MM/DD/YYYY	*
Last Day of Term	MM/DD/YYYY	*
Semester 1 (S1)		
First Day of Term	MM/DD/YYYY	*
Last Day of Term	MM/DD/YYYY	*
Semester 2 (S2)		
First Day of Term	MM/DD/YYYY	*
Last Day of Term	MM/DD/YYYY	*
Quarter 1 (Q1)		
First Day of Term	MM/DD/YYYY	*
Last Day of Term	MM/DD/YYYY	*

d. **Term Dates:** Enter the first and last day of the school year, then populate the dates of each of the remaining terms. .

- ***Date must match the Years & Terms dates - exactly.***
- ***Make sure no gaps exist between term dates!***
- **Click “Continue”. The following page will appear.**

Automatic Schedule Setup - Build Information

You have unsaved changes. Click Submit to complete the Automatic Schedule Setup process.

Build Information	
<input checked="" type="radio"/> Build and Load	Use this scenario setting to build a master schedule and load students into the built schedule.
<input type="radio"/> Load Only	Use this scenario setting if a master schedule is copied or imported and you need to only load students.
Build Name	2017 - 2018
Active Build	<input checked="" type="checkbox"/>
Build Description	Automatic Schedule Setup
Terms	4
Periods	12
Days	5
Course Catalog	
Build Optimizations	
Percent of schedule combinations to evaluate for each course	10
Minimum number of schedule combinations to evaluate for each course	10000
Load Optimizations	
Percent of schedule combinations to evaluate for each student	10
Minimum number of schedule combinations to evaluate before skipping	10000
Best Schedule Weights	
Student conflicts	50
Section balance	50
Total	100

Submit

- e. Check **“Build and Load”** (Unless you are copying your current schedule)

Edit Build Scenario

Build Information
<input checked="" type="radio"/> Build and Load Use this scenario setting to build a master :

OR:

- f. Check **“Load Only”**- If you plan to load students into an existing master schedule or one you will copy from a previous year. (You can make manual modifications.)

<input checked="" type="radio"/> Load Only Use this scenario setting if a master schedule is copied or imported and you need to only load students.

1. Verify **“Build Name”**. (The future scheduling year will be the Build Name by default.)
2. Check **“Active Build”** if not already checked.
3. Change **“Build Description”** if desired.
4. Verify Terms, Periods, and Days.
5. 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. **Submit.**
6. Leave the Build Optimizations, Load Optimizations, and Best Schedule Weights to the default settings.
7. Scroll to bottom of page and click **submit. (End of AutoScheduler Setup.)**

Step 4. Years and Terms: PowerScheduler > Years and Terms (under Scheduling Setup)

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

Option	Value
Name of Term	2017-2018
Abbreviation	17-18 (example: Q1) <small>Note: This abbreviation must start with a letter. Do not use a number by itself.</small>
First Day of Term	08/01/2017
Last Day of Term	06/30/2018
What portion of the school year does this term represent?	Full year
Import File Term #	2700 2700

Populate the Import File Term Number for each of the remaining terms.

Step 5. Set Schedule Year: PowerScheduler > Functions (Under “Tools”) > Set Schedule Year

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

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

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

Step 6. Set Schedule Year in the Feeder School

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:

- Switch to the Feeder School > PowerScheduler > Years and Terms > **Create the Full-Year term minimum**, if not already created. **Populate the Import File Term Number**.
- PowerScheduler > Functions > Set Schedule Year.

NOW – SWITCH TO YOUR SCHEDULING SCHOOL

Step 7. Creating the Course Catalog

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

Create a new Course Catalog each year.

PowerScheduler > Course Catalogs (under Scheduling Setup) > **New** (enter a Name & Description) (Even though you have the option to edit catalog – DON’T! You want it for reference.)

Click **Submit**.

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

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 “**Unavailable Courses**”. (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.

Step 8. New Courses to be Offered for Next Year (Optional):

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

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** – select the current and new school years.
- Enter the Course Name and Course Number (be sure the course number is unique & **does not include SPACES** or SPECIAL CHARACTERS). 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. Locate the newly created course; **check** the box next to the newly created course; click **Submit**.

Step 9. Defining Optional Schedule Parameters

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.

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.

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.

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.

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.

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 and teacher 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 and teachers to a team.
 - Note: If you are running a “Build”, those courses that are to be teamed, check “Use Pre-established Teams” on the Course Preferences page. For schools using a “Load Only”, the teams need to be assigned to the sections.

Houses: (optional)

- Students can be separated into “Houses”; for example, grades 9 & 10 in House A, and grades 11 & 12 in House B.

Buildings: (optional)

- Rarely used.

Step 10. Defining Rooms:

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.

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

- PowerScheduler > Functions > Update Selections > ScheduleRooms table.
- Select your school’s rooms by clicking “Select all XX Records in this School”.
- Click on “Modify Records”
- The field for “Schedule This Room” is “Scheduled”; set it to ‘1’ (to check the box)

Modify Records

Current Table: ScheduleRooms

Current number of records in selection: 43

Scheduled :=

Note: This function will permanently modify your database. Use only if you know exactly what y caution. Changes are permanent. You may use ^ to reference the existing value of the field.

Step 11. Defining Student Information – (Switch to “Live-Side”)

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.

- **Set Next School Indicator** 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.
 - Do all grade levels to be sure you grab students who enrolled after the EOY process, INCLUDING students coming into your building from the feeder school.
- **Auto-Filling Student Scheduling Preferences - (Switch to PowerScheduler)**
 - **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	<input type="text" value="9"/>	<input type="text" value="10"/>	<input type="text" value="11"/>	<input type="text" value="12"/>	<input type="text" value="99"/>	<input type="text" value="13"/>	<input type="text" value="14"/>
Priority	<input type="text" value="40"/>	<input type="text" value="30"/>	<input type="text" value="20"/>	<input type="text" value="10"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Schedule This Student	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>	<input type="text" value="No"/>	<input type="text" value="No Change"/>	<input type="text" value="No Change"/>
Year of Graduation	<input type="text" value="2021"/>	<input type="text" value="2020"/>	<input type="text" value="2019"/>	<input type="text" value="2018"/>	<input type="text" value="2017"/>	<input type="text" value="2017"/>	<input type="text" value="2017"/>

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.
- You can Mass Enroll.

Step 12. 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.
 - **NOTE:** In order to use Course Recommendations, those courses must be in the PowerScheduler Course Catalog AND must have the “Schedule This Course” box checked on the Course Preferences page.

b) Create Course Groups

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

c) Create Student Course Request Pages

- Suggest do not include symbols in request screen names.
- Suggest keeping the request screen name 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.
- If the Course Request Screens are not available they can be copied with the help of NWOCA Staff – (Instructions #8031)

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. (PowerScheduler > Screen Set-Up > Select Grade Level > Check PowerSchool Admin Portal and Check PowerSchool Student and Parent Portal > Submit (Repeat for each grade level.)

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. (Done right before you are ready for students to make requests.)*

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

Step 13. 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.

Step 14. Lastly, 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