

## 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 (example): `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:**

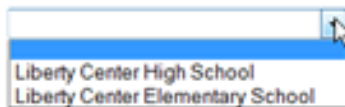
(Repeat the steps to assign a next school indicator in the feeder school, if there is one.)

5. \_\_\_ **Next School Indicator for Non-attending Students: (Optional)**

- 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.

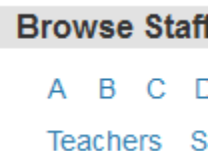


- Click **Submit**. **NOTE:** Prior to running the End of Year process, the Next School Indicator will need to be reassigned to these students, as it is required for the End of Year process.

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

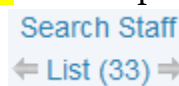
On the **Live Side**, From the Start Page, click on the **Staff** tab:

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 in which you are working):

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	Grade 3	Grade 4
Next Year Grade	-1	0	1	2	3	4	
Priority		50	40	30	20	10	
Schedule This Student	No Change	Yes	Yes	Yes	Yes	Yes	No Change
Year of Graduation		2029	2028	2027	2026	2025	

**Submit**

Leave fields blank for any grade levels not to be scheduled in your school next year or to make no change. Click Submit to complete the autofill. 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: \_\_\_\_\_ (Quarters, Trimesters, Semesters)
  - 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.

Submit

**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.** (The following page will appear:)

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

Continue

- Select the term that represents the length of your **shortest** term – On the Live Side (Use the information you recorded in Step 8). (Same as current year)
- 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**

<input checked="" type="checkbox"/>				Full Year			
<input checked="" type="checkbox"/>		Semester				Semester	
<input type="checkbox"/>		Trimester		Trimester		Trimester	
<input checked="" type="checkbox"/>	Quarter		Quarter		Quarter		Quarter

Continue

- **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 terms on the Live side, Current Year. Click **Continue**.)
- Enter the first and last day of the school year and dates for each term.
  - Leave no gaps
  - Determine the STUDENTS' start date for each term
  - The end date for the previous term will ALWAYS be one day before the start date. (Even if the term end date falls on a weekend or holiday)
  - Click **Continue**

**Example:**

**Automatic Schedule Setup - Define Term Dates**

<b>Full Year (FY)</b>		
First Day of Term	8/18/2016	<input type="checkbox"/> *
Last Day of Term	5/26/2017	<input type="checkbox"/> *
<b>Quarter 1 (Q1)</b>		
First Day of Term	8/18/2016	<input type="checkbox"/> *
Last Day of Term	10/18/2016	<input type="checkbox"/> *
<b>Quarter 2 (Q2)</b>		
First Day of Term	10/19/2016	<input type="checkbox"/> *
Last Day of Term	12/21/2016	<input type="checkbox"/> *
<b>Quarter 3 (Q3)</b>		
First Day of Term	12/22/2016	<input type="checkbox"/> *
Last Day of Term	3/9/2017	<input type="checkbox"/> *
<b>Quarter 4 (Q4)</b>		
First Day of Term	3/10/2017	<input type="checkbox"/> *
Last Day of Term	5/26/2017	<input type="checkbox"/> *

- **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.)



Build Information	
<input type="radio"/> Build and Load	Use this scenario setting to build a master schedule and load students into the built schedule.
<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.
Build Name	2015 - 2016 <input type="checkbox"/> Active Build
Build Description	Automated Schedule Setup
Terms	4
Periods	9
Days	1
Course Catalog	<input type="text"/>
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

10.      **Click on Scenarios, 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).

Example:

**New Course Catalog**

Catalog	Value
Name	2016-2017 Course Catalog
Description (80 character limit)	2016-2017 Course Catalog

Then click on **"Scenarios"**, 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**

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	<input type="text" value="2016-2017"/>
Abbreviation	<input type="text" value="16-17"/> (example: Q1) <small>Note: This abbreviation must start with a letter. Do not use a number by itself.</small>
First Day of Term	<input type="text" value="08/18/2016"/>
Last Day of Term	<input type="text" value="05/26/2017"/>
What portion of the school year does this term represent?	Full year ▾
Import File Term #	<input type="text" value="2600"/> 2600

Click **Submit**.

Repeat this process for each term, populating the Import File Term # for each.

**12. \_\_\_ Set Schedule Year: PowerScheduler > Functions > Set Schedule Year**

Sets the schedule year used for scheduling requests.

Years	<input type="text" value="2016-2017"/>
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**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	Coy Elementary School
Source year (the school year that the Master Schedule is being copied from)	<input type="text" value="2015-2016"/>
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 **2015-2016**, and check the “**Confirm to proceed**” box, and click **Submit**.

**14. \_\_\_ 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**

- Enter the new course name and number (be sure the course number is unique, and **do NOT include spaces!**)
- Associate the new course to your school & for Available School Years, be sure to select both the current year and next year.
- 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 Course Catalog**
- Scroll to the newly created course and check the box to activate this course.

**15. \_\_\_ 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.
- For “Apply To:” choose “All courses in the active catalog.”
- For “Schedule This Course”, choose “Yes”. Click Submit.

### Auto-Fill Course Info

Field Name	Value
Schedule This Course	Yes
Department	
Associate	

**16. \_\_\_ 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.

**17. \_\_\_ 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 (NO leading zeroes)
  - Close Section at Max
  - Maximum Enrollment
- To Delete a section, click on 'Delete' at bottom of Edit Section page.

**18. \_\_\_ 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.

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".

**(Proceed with caution!)**

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

**19. \_\_\_\_ 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. If this box is already populated from the current year, but you need to modify some sections, here are some tips:

**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:

ES4ART1,ES4GYM.1,ES4LANGAR.1,ES4MATH.1,ES4MUSIC.1,ES4READ.1,ES4SCIENC.1

**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.

**(separate sections by commas)**

**Be careful to not put spaces after commas, and make sure you type the exact course and section numbers using this format:** course.section,course.

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

20. 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.

A screenshot of the PowerScheduler interface. At the top, there is a search bar with a magnifying glass icon and the text "View Field List". Below this is a row of letters from A to Z. Underneath the letters are two rows of "Next Year Grade Level" and "Current Year Grade Level", each with options 3, 4, and 5. At the bottom, there are "Other Options" including M, F, All, and 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**

A screenshot of the "Mass Enroll" form. The title is "Mass enroll the selected students into which class?". There are two options: "Select a teacher..." with a dropdown arrow, "Period" with a dropdown arrow, "Day" with a dropdown arrow, and "Term" with a dropdown arrow. Below these is "OR" and a text box labeled "(course.section)". At the bottom, it says "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**

A screenshot of the "Mass Enroll" form, similar to the one above. In this version, the text box labeled "(course.section)" contains the value "2958.2". A large red arrow points from the left towards this text box. The rest of the form is identical to the previous screenshot.

## 21. \_\_\_\_ 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
- b. PowerScheduler > Students > enter a search command to select students who have the “Schedule This Student” box checked, (sched\_scheduled=1) then run the “Unscheduled Students” report – use this method to identify students who are not enrolled in any classes.

**Example:** **PowerScheduler > Students**

Enter Search Command: **sched\_nextyeargrade=4;sched\_scheduled=1**

Choose “**Select These Students**”.

Click on “**PowerScheduler**” in your breadcrumbs.

Click on “**Reports**”.

Scroll down the list and click on “**Unscheduled Students**”.

Choose to run the report for “The Selected \_\_\_\_ Students. Click **Submit**.”

If any students are found with no classes scheduled in a certain period, the number of students will appear beside that Term/Period/Day/. Click on that number to see those students. (If the same number of students is listed for multiple periods, it is likely that those are the same students.)

At the bottom of the list, click on “**Make This the Current Selection of Students**”.

Next, choose “**Work with these students**”.

At the top of the list of students, choose “**Schedule**”. Click on a student name to see the schedule for that student. Repeat for other students in the list.


## 22. \_\_\_\_ (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"/>

