

## ***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. **Course Preferences:** Recommend that the following be set at minimum:
  - 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
  - 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 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. Course Assignments: Teacher Assignments for Courses

- a. Courses > Assignments tab
  - 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
- d. See handout for additional constraints.

## 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. (After the system builds the initial rank, you can make manual adjustments.) Recommend running a Build/Validate once using system-assigned rank.
- 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.**

- 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**

- 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.

**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 Style	Helvetica 10 (B) ▾
Class Listings Style	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**