

2020-21 Elementary Scheduling – Using PowerScheduler (Pre-EOY)

(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. Add the 2020-2021 Full Year term, dates, and enter File Term number.
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: `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

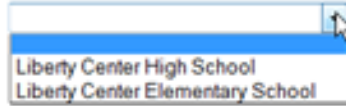
Submit

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 students being served outside your building:**
 - 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.



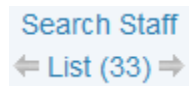
- Click Submit. **NOTE:** The Next School Indicator will eventually need to be reassigned to these students, as it is required for the End of Year process.

6. ___ Teachers: (Live Side) To confirm that all necessary teachers are 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”, then choose the teacher you wish to update. Select their 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. If you don’t see a teacher in the list, go to the live side and under the Staff tab, find the Scheduling Setup screen and update the fields there.



- **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 you are working in):

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	<input type="text"/>	<input type="text"/>	<input type="text"/>	2	3	4	<input type="text"/>
Priority	<input type="text"/>	<input type="text"/>	<input type="text"/>	30	20	10	<input type="text"/>
Schedule This Student	No Change ▾	No Change ▾	No Change ▾	Yes ▾	Yes ▾	Yes ▾	No Change ▾
Year of Graduation	<input type="text"/>	<input type="text"/>	<input type="text"/>	2031	2030	2029	<input type="text"/>

Leave fields blank for any grade levels not to be scheduled in your school next year or to make no change. Modify some students individually if necessary.

Note: For PS and KG students, set the “Next Year Grade” to the needed grade level based on student promotion and/or the needs of your 3rd party registration software.

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 may 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.

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

10. ____ **Click on AutoScheduler Setup.** – There are four steps in this process.
(Use the information you recorded in step 8.)

- Define Years & Terms, Days, and Periods for a “Load Only” scenario. **Click Continue.**

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

- Select the term length of your **shortest** course.
(**Note:** For attendance purposes, check at least the Full Year and Quarter boxes.)
- **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 classes on the Live side, Current Year. **Click Continue.**

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](#)

- **Define Term Dates** - Enter the first and last day of the school year and each term.
 - Leave no gaps
 - Determine the STUDENTS' start date for each term
 - The end date for each term will always be one day prior to the start date of the following term. (Even if the term end date falls on a weekend or holiday.)
- **Click Continue**

Automatic Schedule Setup - Define Term Dates

Full Year (FY)	
First Day of Term	<input type="text"/> (MM/DD/YYYY) *
Last Day of Term	<input type="text"/> (MM/DD/YYYY) *
Quarter 1 (Q1)	
First Day of Term	<input type="text"/> (MM/DD/YYYY) *
Last Day of Term	<input type="text"/> (MM/DD/YYYY) *
Quarter 2 (Q2)	
First Day of Term	<input type="text"/> (MM/DD/YYYY) *
Last Day of Term	<input type="text"/> (MM/DD/YYYY) *
Quarter 3 (Q3)	
First Day of Term	<input type="text"/> (MM/DD/YYYY) *
Last Day of Term	<input type="text"/> (MM/DD/YYYY) *
Quarter 4 (Q4)	
First Day of Term	<input type="text"/> (MM/DD/YYYY) *
Last Day of Term	<input type="text"/> (MM/DD/YYYY) *

- **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

Build Master
Use this scenario setting to build a master schedule and load students into the built schedule.

Load Only
Use this scenario setting if a master schedule is copied or imported and you need to only load students.

Build Name: 2020 - 2021

Active Build:

Build Description: Autumnal Schedule Setup

Terms: 4

Periods: 10

Days: 1

Course Catalog: [Empty]

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 credits: 50

Section balance: 50

Total: 100

Submit

11. **2020-2021 Course Catalog** – On the left side menu, select Course Catalogs, then click the “New” button. Fill in the Name and Description as shown below.

Edit Course Catalog

Catalog	Value
Name	2020-2021 Course Catalog
Description (80 character limit)	2020 - 2021 Course Catalog

Delete **Submit**

12. **Now go back to the “Scenarios” screen and click on the 2019-2020 scenario.**
 - You should now see that the course catalog field is populated. For those that do not see a course catalog option, select the new catalog from the drop-down list, then Click **SUBMIT**.

13. **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):

Edit Schedule Term

Option	Value
Name of Term	2020-2021
Abbreviation	20-21 (example: Q1) <small>Note: This abbreviation must start with a letter. Do not use a number by itself.</small>
First Day of Term	08/14/2020
Last Day of Term	05/21/2021
What portion of the school year does this term represent?	Full year
Import File Term #	3000 3000

[Delete](#) [Submit](#)

Click **Submit**.

14. **Set Schedule Year: PowerScheduler > Functions > Set Schedule Year**

Set Schedule Year

Sets the schedule year used for scheduling requests.

Years

[Submit](#)

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

- Select the Source Year of **2019-2020**, and check the **“Confirm to proceed”** box, and click **Submit**.

Copy Master Schedule

This function will replace the following information in the scheduling area

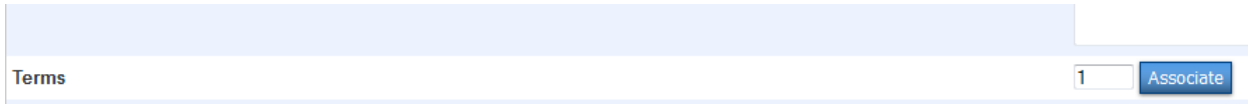
1. Years and terms from the selected year into the scheduling area.
2. Periods from school setup into the scheduling area.
3. The entire Master Schedule from the selected year into the scheduling area.

Option	Value
School	Evergreen Elementary
Source year (the school year that the Master Schedule is being copied from)	2019-2020
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](#)

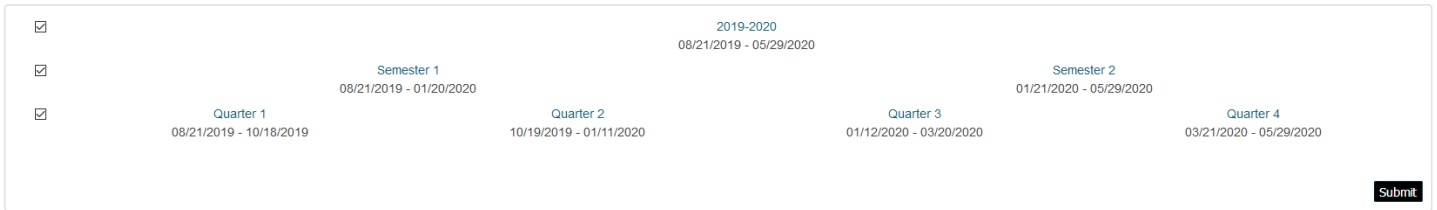
16. ____ Associate the Terms on the New Scenario:

Click **Scenarios** > Select the active scenario > Click ‘**Associate**’ box next to “Terms”.



Check the box next to each term; then click Submit.

Schedule Term Setup



Check all boxes, even if you have no classes that meet for just a semester or quarter.

Note: You will be returned to the first Edit Scenario page; now click **Submit** again!

17. ____ 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** (Be sure the course number is unique.)
- 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 Catalog** > View Master Course List
- Scroll to the newly created course and check the box to activate this course.

18. ____ 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. **UPDATE THE SCHEDULE THIS COURSE DROP DOWN CHOICE, SET TO YES!**

The screenshot shows the 'Auto-Fill Course Info' form. It has a table-like structure with 'Field Name' and 'Value' columns. The 'Apply To' section has two radio buttons: 'All courses in the active catalog' (selected) and 'The selected 0 courses'. The 'Schedule This Course' field is a dropdown menu with 'Yes' selected, circled in red. Other fields include 'Department', 'Build Type' (set to 'No Change'), and a 'Clear Value' checkbox. An 'Associate' button is also visible.

19. ____ 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.

20. ____ 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
 - Close Section at Max
 - Maximum Enrollment
- To Delete a section, click on ‘Delete’ at bottom of Edit Section page.

21. ___ 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:

- ___ **Determine the BuildID** for your 2020-21 scenario. This is shown at the top of the initial scheduling screen when logging into the PowerScheduler:

Scheduling

Build: 2020 - 2021 (1003) Catalog: 2020-2021 Course Catalog (951)

Use the navigation pane on the left to work with the schedule related maintenance items listed.

- Click a schedule item category to view and edit the schedule related setup information.

Scenarios									
Build Scenario	Last Build	Last Load	Students With Requests	Requests Satisfied	Students Without Conflicts	Status	%Scheduled	%Core Scheduled	%Requests Satisfied
2011 - 2012	0/0/0	0/0/0	0	0	0%	Inactive	89	89	71
2016 - 2017	0/0/0	0/0/0	0	0	0%	Inactive	98	98	0
2017 - 2018	0/0/0	0/0/0	0	0	0%	Inactive	91	91	0
2018 - 2019	0/0/0	0/0/0	0	0	0%	Inactive	66	66	0
2020 - 2021	0/0/0	0/0/0	0	0	0%	Active	0	0	0

- **Update the Close At Max field**, click on “**Functions**” (lower left).

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**”.

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.

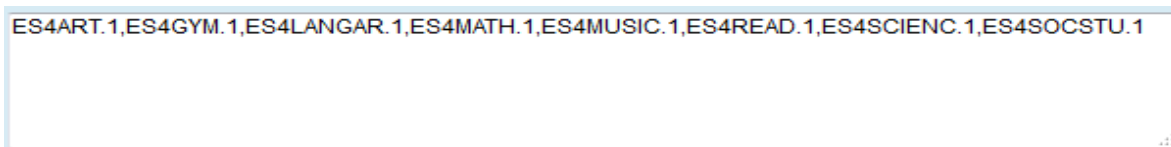
Modify Selected Records

22. ___Add 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.

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.

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:



Be careful to not put spaces after commas, and make sure it is the exact course and section number using this format: course.section,course.section

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

23. ___Use “Schedule Mass Enroll” function to enroll students into the appropriate Homeroom.

• ***It’s always a good idea to test this function with only one or two students to verify that the dependent sections are working properly.***

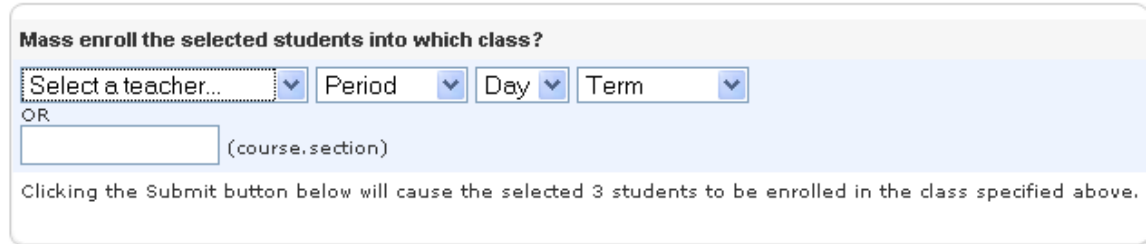
• PowerScheduler > Students > (select a grade level) > Select Students by Hand > Use the CTRL-Click method to select students.



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**” as shown in the following sample:

Mass Enroll



Mass enroll the selected students into which class?

Select a teacher... Period Day Term

OR

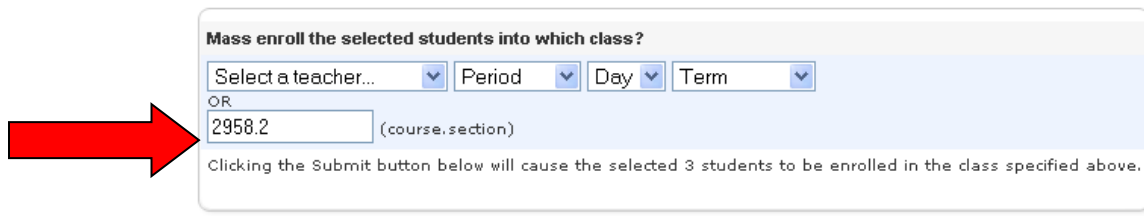
(course.section)

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

(course.section)

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

24. ____ 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**”.

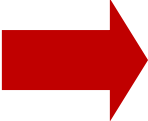
At the top of the list of students, choose “**Schedule**”. Click on a student name to see the schedule for that student. Repeat for other students in the list.

25. ____ (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"/>