

# PowerScheduler Prepare to Build Instructions

## School Year 2022-2023

### 1. Years and Terms – Must be done before completing any of the other instructions.

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

### 2. To Create a Scenario – Click AutoScheduler Setup:

- a. In the School where the students will be scheduled, click on **PowerScheduler**.
- b. 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.

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

- c. Click on **AutoScheduler Setup**.
- d. Define the Lowest Term Level, Number of Periods, and Number of Days. Click “Continue”.

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

- e. Select the term that represents the length of your **shortest** class. For example, if you only have full-year classes, select “Full Year”; if you have semester classes, select “Semesters”; if you have 9-week long classes, select “Quarters”.

**Automatic Schedule Setup**

Option	Value
Lowest term level division	Quarters ▾
Number of periods	8 ▾
Number of days	2 ▾

- f. Select the number of periods and days; typically, a few extra periods are added in order to schedule class outside of the normal “bell schedule”.
- “Days” refers to the number of days in your rotation or cycle; not how many days school meets each week.
  - Click “Continue”.
- g. On the next screen, check all appropriate scheduling terms for your school. Click “**Continue**”. (These terms reflect course length, not grading terms.)

**NOTE: You may need to check both the full year and quarter boxes, even though you may not have full year or quarter length classes. Issues with custom attendance reports may result if these boxes are not checked.**

**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](#)

- h. **Term Dates:** Enter the first and last day of the school year, then populate the dates of each of the remaining terms.
- **Date must exactly match the Years & Terms dates.**
  - **Make sure no gaps exist between term dates!**
  - Click **Continue**.

## Automatic Schedule Setup - Define Term Dates

Full Year (FY)	
First Day of Term	MM/DD/YYYY <input type="button" value="Calendar"/> *
Last Day of Term	MM/DD/YYYY <input type="button" value="Calendar"/> *

Semester 1 (S1)	
First Day of Term	MM/DD/YYYY <input type="button" value="Calendar"/> *
Last Day of Term	MM/DD/YYYY <input type="button" value="Calendar"/> *

Semester 2 (S2)	
First Day of Term	MM/DD/YYYY <input type="button" value="Calendar"/> *
Last Day of Term	MM/DD/YYYY <input type="button" value="Calendar"/> *

Quarter 1 (Q1)	
First Day of Term	MM/DD/YYYY <input type="button" value="Calendar"/> *
Last Day of Term	MM/DD/YYYY <input type="button" value="Calendar"/> *

- i. Select “**Build and Load**” if you want to have PowerScheduler Build a Master Schedule for your building. Enter a build description, verify the number of terms, periods, and days. Be sure to include the scheduling year in the Build Name for reference.

### Edit Build Scenario

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

**OR:**

- j. If you plan to load students into an existing master schedule or one you will copy from a previous year – Check “**Load Only**”. (You are able to make manual modifications to the Master Schedule after the copy process.)

<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.
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1. Check “**Active Build**” if not already checked.
2. The Course Catalog drop-down menu should be left **blank** at this point. A Course Catalog for the new year will be created later in this checklist.
3. Scroll to bottom of page and click **Submit**.
4. After initial Submission, adjustments to the Build Name, Build Description, Periods, or Days can be made by clicking on “**Scenarios**” in the left-hand menu in PowerScheduler.

### 3. Years and Terms: PowerScheduler > Years and Terms (under Scheduling Setup)

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

#### Edit Schedule Term

Option	Value
Name of Term	2022-2023
Abbreviation	22-23 (example: Q1) <small>Note: This abbreviation must start with a letter. Do not use a number by itself.</small>
First Day of Term	08/17/2022
Last Day of Term	05/24/2023
What portion of the school year does this term represent?	Full year
Import File Term #	3200 3200

Legend  
Icons - Date Entry

Delete Submit

Note: 2022-2023 = 3200

- b. **Open** the link for each of the remaining terms and **populate the Import File Term #** for each.

### 4. Set Schedule Year: PowerScheduler > Functions (Under “Tools”) > Set Schedule Year

- a. Select the **new school year** from the drop-down menu; click **Submit**.
- b. This allows students to enter course requests in the Student Portal for the future year.
- c. This step also links the course request screens you will create in PowerScheduler to the future year.

### 5. Set Schedule Year in the ***Feeder School***

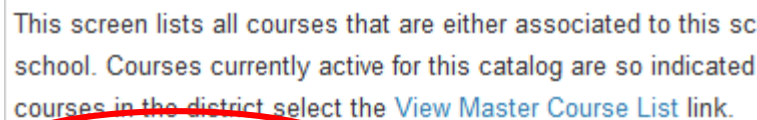
- a. In order for the incoming grade level to be allowed to request courses for your school for the next school year, these 2 steps are required:

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

**Reminder...SWITCH TO YOUR SCHEDULING SCHOOL**

## 6. Creating the Course Catalog

- a. The course catalog is a set of courses offered during a specific school year.
- b. Create a new Course Catalog each year.
- c. **PowerScheduler** > **Course Catalogs** (under Scheduling Setup) > **New** (enter a Name & Description that includes the Scheduling Year) (Do Not Edit the Catalog at this point in time).
- d. Click **Submit**.
- e. Select **Scenarios** > **Select the active scenario by clicking the Senario Name > from the Course Catalog drop-down menu, select the new catalog. Click Submit.**
- f. Below Scheduling Setup, Select **Course Catalogs** > click on **Edit Course Catalog** for the newly created catalog.
  - By default, all currently active courses will be included in the new catalog.
  - Uncheck 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 and will need to be manually checked to be added to the catalog.
  - 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 “**View Master Course List**”. (This option is displayed in blue at the top left side of the list.)



This screen lists all courses that are either associated to this school. Courses currently active for this catalog are so indicated courses in the district select the [View Master Course List](#) link.

[View Master Course List](#)

- Activate the course, then navigate back to the catalog and confirm that it is checked and available for scheduling.

## 7. New Courses to be Offered for Next Year (Optional):

- a. New Courses can be created in the **District Office** building and associated to the PowerScheduler Course Catalog at any time.
- b. Any new courses to be offered should be created on the Live side at the **District Office** building first, and then activated to the school's new course catalog in PowerScheduler.
  - Switch to the **District Office** to add a new course for next year.
  - **District > Courses > New Course**
  - **Select the School(s)** that will be using the course and the **School Year** – select both the current and the new school year.
  - 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**.

## 8. Defining Optional Schedule Parameters

- a. **Periods:** PowerScheduler > Periods
  - The number of periods that appear here was defined during the creation of your Scenario and 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 order of classes on the Matrix View page and printed student schedules to be displayed out of order.
- b. **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.

c. **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.

d. **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.

e. **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.

f. **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.

### g. Houses: (optional)

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

### h. Buildings: (optional)

- Rarely used.

## 9. Defining Rooms:

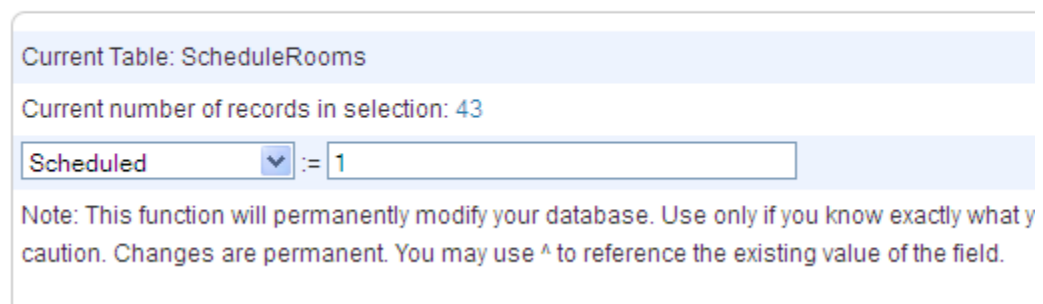
a. Rooms may be defined in any of the following ways:

- 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.

b. 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 := 1

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

## 10. Defining Student Information – (Switch to “Live-Side”)

This step is needed to determine what students will be included in PowerScheduler and 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.
  - Complete for all grade levels to be sure you select students who enrolled after the EOY process, INCLUDING students coming into your building from the feeder school(s).



- **Auto-Filling Student Scheduling Preferences - (Switch to PowerScheduler in your building)**
  - **PowerScheduler > Functions > Auto-fill Student Information**
- Updating Student Scheduling Preferences Using Update Selections

#### Auto-Fill Student Info

Field Name	Grade 5	Grade 6	Grade 7	Grade 8	Grade 9	Grade 10	Grade 11	Grade 12	Grade 13	Grade 14
Next Year Grade	<input type="text" value="6"/>	<input type="text" value="7"/>	<input type="text" value="8"/>	<input type="text" value="9"/>	<input type="text" value="10"/>	<input type="text" value="11"/>	<input type="text" value="12"/>	<input type="text"/>	<input type="text" value="13"/>	<input type="text" value="14"/>
Priority	<input type="text" value="70"/>	<input type="text" value="60"/>	<input type="text" value="50"/>	<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="Yes"/>	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>	<input type="text" value="No Change"/>	<input type="text" value="No Change"/>	<input type="text" value="No Change"/>
Year of Graduation	<input type="text" value="2029"/>	<input type="text" value="2028"/>	<input type="text" value="2027"/>	<input type="text" value="2026"/>	<input type="text" value="2025"/>	<input type="text" value="2024"/>	<input type="text" value="2023"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

- You can do this manually for individual students on the “Scheduling Setup” screen.
- Must be done for the incoming grade level in the feeder school(s) as well.

## 11. Entering Student Course Requests using the Student/Parent Portal Screens (Optional)

### a) Course Recommendations

- **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.**
- 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.

### b) Create Course Groups

- Do not include symbols in course group names.
- Keep the course group name short; due to a limited number of characters

### c) Create Student Course Request Pages

- Do not include symbols in request screen names.
- Keep the request screen name short; there may be a limited number of characters.
- We 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 (may be U\_StudentsUserField)-** 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**

## 12. Course Prerequisites

- Done on the Live side
- School > Courses > Edit the Course > click on “Prerequisites” tab.
- Type a note in the box, click SAVE (without the note, the rules are not visible to the student)
- Now, for same course: Select the + sign to the right of the course that will be assigned a prerequisite
- Pick a Rule Type, click the ADD button
- If there are multiple rules and the student must meet any of them, change the default “All Of” to “Any Of”
- Select a Rule Type
- CLICK SAVE
- NOTE: This feature will not work if course number is missing on Historical Grades.