



FLOW OF SCHEDULING PROCESS IN POWERSCHEDULER WHEN DOING A BUILD & LOAD SCENARIO

Purpose: Administration - This document will provide you with a Flow of the various activities associated with using PowerScheduler while setting up a **Build & Load** Scenario. To insure that we are all on the same page, when using a Build & Load Scenario, it is the School's intent to create a NEW Master Schedule and then Load Students into that Master Schedule.

We will assume that you have determined WHO should have access to PowerScheduler and in turn granted access to those people.

Unless otherwise indicated, ALL activities are performed in PowerScheduler!

Activities not performed in PowerScheduler will be identified as being performed on the "Live Side" which is the current year PowerSchool that you access every day.

Before proceeding – it is recommended that you have a copy of your Term Dates for the upcoming School Year!

Set Up New Course Catalog

(Click Catalogs – under Parameters)
(Name Course Catalog – Ex. 2009-2010)



AutoScheduler Setup

(define Terms, # Periods, #Days)
(enter Start – End Dates for Terms)
(Click Build & Load)
(Name Scenario – Indicate Active)
(Select Course Catalog – just created above)



Correct Year Name

(Click on Years & Terms)
(Click on Full Year – rename to 2009-2010 – abbreviate as 09-10)



Set Schedule Year

(Under Tools – Functions – Select Set Schedule Year)
(Select 2009-2010 – or appropriate upcoming year)





Copy Last Year's Master Schedule

(Tools – Functions – Select Copy Master Schedule)
(Select the Current Year Master Schedule)

Re-Set Terms, Periods & Days

(Click on the Scenario you just created earlier)
(Click Associate Button by Terms)
(Check Full Year & Any Other Terms your School uses)

NOTE: These were most likely unchecked in the Copying of the Master Schedule
(Correct Start & End Dates for each Term you have)
(Click Submit at the Bottom of the Scenario)

NOTE: Each time you make any type of change to a Scenario, you need to be sure to hit Submit at the bottom of the page. This is what updates the scenario itself.

Getting your Students Ready for Scheduling

*******DONE ON THE LIVE SIDE*******

(Set appropriate Next School Indicator based on Grade Level)
(Set Scheduling Flag to "Schedule This Student" for those students returning)
(Student Field Value – set Sched_Scheduled to field value of 1)
(All Students Need a Next School – even if not returning)

AutoFill Student Information

(Tools – Functions – select Auto Fill Student Information)
(Mass Assign Next Year Grade Level)
(Mass Assign Scheduling Priority)

NOTE: Be sure to maintain these fields as well as "Schedule This Student" and Next School for individual Students who will not be scheduled as attended. This is done on the Live Side – Call up the Student Record – Scheduling Setup – bottom link on the left.

Auto Generate Rooms

(Tools – Functions – select Auto Generate Rooms)
(After being generated – click on the Rooms Link under Resources to view)

Setting up Teachers

*******DONE ON THE LIVE SIDE*******

(School Start Page – Click Staff)
(Click Magnifying Glass icon to select All Staff)
(Click Functions – at the bottom of the list)
(Select Set Staff Field Value – enter Sched_Scheduled as the field and enter True as the Field Value)



Courses

(Identify New Courses that need to be added to the Course Catalog)

(Identify Courses that you plan to NOT offer Next year – remove from Catalog)

(Make sure the Course is set to Schedule or Not Schedule depending on if you plan to offer it or not)

(Add New Courses to the Live Side – Recommended they be added at the District)

(Course Numbers are a District Entity)

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Verify Periods & Days

(Review to see these are accurate)

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Define Section Types if Necessary

(Under Parameters – Section Types)

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Enter Student Requests

(Determine the best method for your School to accomplish this)

(Run Reports as necessary)

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Defining Course Parameters

(Can be done Manually, through Auto Fill Course Information or Auto Generate Course Information)

(Recommend that you use Auto Generate Course Information – Brings the MOST information forward)

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Setting up Teacher Assignments

(May choose to Auto Fill Teacher Information to Mass Assign specific Fields)

(Recommend that you select Auto Generate Teacher Assignments under Functions)

(You may manually enter or edit a Teacher Assignment)

(Sections Assigned to Teachers are totaled and this Total is what populates the Number of Sections of a Course that are offered.)

(Schedule this Teacher must be checked for Teacher to Show up)

(Select Teachers Preferred Room)

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Further Define Course Information

(Verify Credit Hours are correct)

(Verify – “Schedule This Course is Checked”)

(Build Type – USUALLY Standard)



(Verify – Enter Max Enrollment)
(Periods Per Meeting – Frequency)

NOTE: May be able to Mass Fill these fields and only fix the exceptions
(Allow Student Repeats – Same Term – Different Term)
(Valid Start Periods – Blank for ALL)
(Valid Terms)

(Valid Day Combinations)
(Load Priority – Tie Breaker between two Courses)

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Departments – serve as 2nd Room Preference
(Departments should match LIVE SIDE)
(Associate Departments with Rooms, Teachers & Courses)

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Build Constraints – Used in Building the Master Schedule
(Use only when necessary – can impact results)

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Load Constraints – Used when Loading Students
(Student Preferences Constraint may be most helpful in directing students to a specific
Teacher or Section, ex. Special Ed)
(Section Linking is a way to make sure students stay together between Courses)

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Course Relationships
("Blocked for Build with" or "May Be Built Concurrent With")
(Must assign a Relationship Code if using the two above)
(Load Relationships – CoReq, PostReq, PreReq)
(Course Relationships pass year to year)

Build Course Rank- Order computer will build Course – Sections
(You can alter the rank – assigning different ranks)
(Run Update Rank – to protect manual adjustments)
(Scheduling situation dramatically changes – rebuild rank)

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Download Scheduling Engine
(Recommended that only one person perform this task)



Schedule Loads – Build

(Validate your Scheduling Data – Run Build – Validate Only)
(To verify results – click (Q) next to Build – This brings up the queue listing)
(Successful runs have Started & Success set to True)
(To view results – Click View under Results Log)
(Review – Correct Errors)

NOTE: When reviewing errors – please note the following:

- **ERROR – This is a level 3 error that must be addressed before you can go on in the process**
- **WARNING – This is a level 2 error that SHOULD be addressed. They do not prevent you from moving forward in the process however.**
- **INFO – These are just informational messages, such as summary information. They are NOT error messages**

(To View the CURRENT Master Schedule it generated – Click IMPORT)
(IMPORT is the only way to view CURRENT results)
(Failure to Import will result in your viewing OLD Data)
(Run this process until satisfied – then progress to Load)

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Schedule Loads – Load

(This process assigns students to Classes)
(Recommended that you run Validation first to clean up any issues)
(Click on (Q) to bring up the results Queue)
(You will need to IMPORT your Results to view CURRENT Results)
(Failure to import will result in viewing old data)

Once imported – Reports you may find helpful include:

- Schedule Course Enrollment
- Non-Scheduled Course Requests – Exclude Alternates
- Non-Scheduled Student Requests – Exclude Alternates
- Master Schedule List

(Run until Satisfied with the Results)

LOAD STUDY HALLS (IF APPLICABLE)

(Information on this process available in a different handout)

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Commit the Schedule – Point of No Return (Verify Term Dates are correct before proceeding)

(Commit process takes it to the Live Side)
(Scheduling information becomes visible to Students, Parents & Teachers)