

# **PowerScheduler: Prepare to Load**

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PowerSchool  
Student Information System

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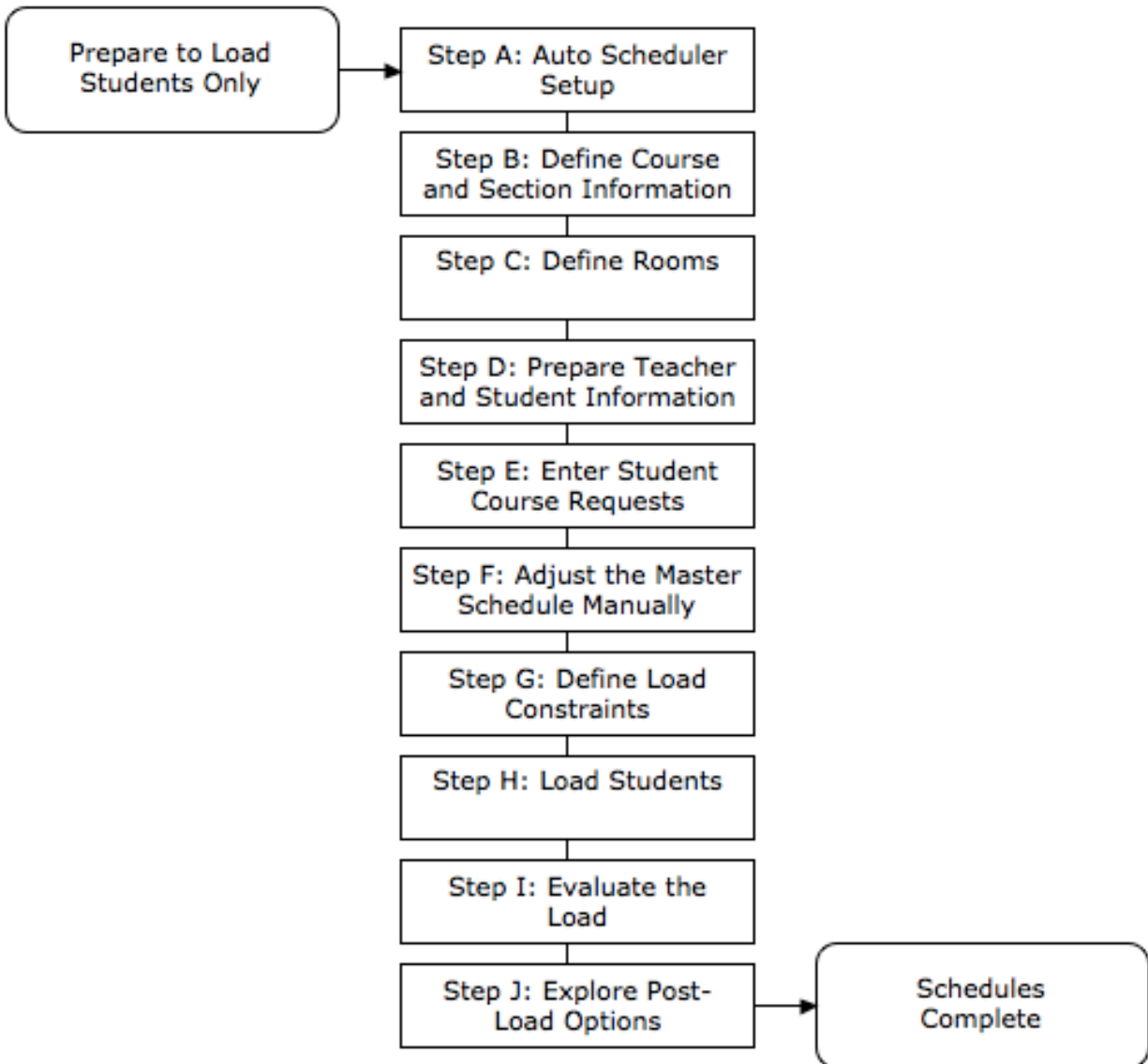
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## Introduction

Use these instructions to complete each step in the Prepare to Load process in PowerSchool Student Information System (SIS). Perform the Prepare to Load process if you want to use a previously-created (or “built”) master schedule, and load students into the schedule based on their course requests. The following diagram outlines the steps of the process.



While several people may schedule students, Pearson recommends that only one person perform Step A: Auto Scheduler Setup. While completing the scheduling process, use the PowerSchool Help menu as another great source of information. Keep in mind that the PowerScheduler and the live (or active) side share three items: courses, teachers, and students.

## Step A: Using Auto Scheduler Setup

The Auto Scheduler function sets up the terms, periods, and days associated with the school schedule. Using the Auto Scheduler is optional, but setting up terms, periods, and days is required. If you created years and terms on the scheduling side previously, performing the Auto Scheduler function overwrites those years and terms, whether created manually or by using the Automatic Schedule Setup. However, the Auto Scheduler does not overwrite the years and terms created on the live side.

1. On the Start Page, click **PowerScheduler**

The notice displayed below is a reminder that you need to download the PowerSchool Scheduling Engine before you build your schedule. Not every district needs to perform the next step, but first-time PowerScheduler users will.

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**

2. Select the check box, and click **Submit**
3. Below Processing, click **Auto Scheduler Setup**

Option	Value
Lowest term level division	Semesters
Number of periods	4
Number of days	2

**Continue**

4. Choose the appropriate lowest level term, number of periods, number of days, and click **Continue**

The "Lowest term level division" menu refers to course offerings (it does not refer to when you store grades or send out report cards). For example, your school sends out report cards every quarter; however, students don't change courses each quarter, they change each semester. You would choose **Semesters** from the "Lowest term level division" menu. If your school uses blocks instead of periods, use the Period menu to select your number of blocks. "Days" refers to the number of days in your rotation or day cycle, not how many days school meets each week. Basically, how many days occur before the cycle repeats.

Full Year

Semester

Semester

5. Check the appropriate terms to define for your school, and then click **Continue**

The terms apply to scheduling only, not grading terms. Check **Full Year**, since the Full Year term is required.

Term	Abbreviation	First Day of Term	Last Day of Term
Full Year	FY (MM/DD/YYYY)	<input type="text" value="6/1/2011"/>	<input type="text" value="5/31/2012"/>
Semester 1	S1 (MM/DD/YYYY)	<input type="text"/>	<input type="text"/>
Semester 2	S2 (MM/DD/YYYY)	<input type="text"/>	<input type="text"/>

6. Enter the dates for each of your terms, and click **Continue**

Make sure no gaps exist between the term dates. If your school hasn't finalized the exact dates, don't worry. You can change the dates until you commit the schedule. Committing the schedule is your last step in PowerScheduler.

**Build Information**

**Build and Load**  
 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.

<b>Build Name</b>	<input type="text" value="2011 - 2012"/>	<input checked="" type="checkbox"/> Active Build
<b>Build Description</b>	Automated Schedule Setup	
<b>Terms</b>	<input type="text" value="2"/>	
<b>Periods</b>	<input type="text" value="4"/>	
<b>Days</b>	<input type="text" value="2"/>	
<b>Course Catalog</b>	<input type="text"/>	

7. Select **Load Only** to use the scenario to load students into the master schedule

Use the Load Only option if you plan to load students into a previously or manually created master schedule.

8. Enter a build name, enter a description of the build, and check **Active Build** if this is the scenario you are going to use to load the students into master schedule

The future scheduling year will be the Build Name unless you make a change.

9. The Terms, Periods, and Days fields will contain the information you just set up

If you need to change the terms, periods, or days, do not navigate to the Auto Scheduler Setup again. Instead, select the active scenario, and make the necessary changes.

10. The Course Catalog menu will not contain options for first-time PowerScheduler users

When first-time users submit the scenario, PowerScheduler will create a course catalog. If course catalog options are present, Pearson recommends not choosing one. You should create a new course catalog every year.

11. Do not change the default values in the Build Optimizations, Load Optimizations, and Best Schedule Weights fields at this time

Use the Load Optimizations fields if you are actively loading the students into the master schedule and encounter problems with the amount of time it takes.

12. Click **Submit**

13. Click **Scenarios**, and select the active scenario name

First-time users will see that a course catalog is chosen even though that step was not completed. PowerScheduler created the course catalog automatically, based on your existing catalog from the current year.

<b>Build Name</b>	2011 - 2012	Active Build <input checked="" type="checkbox"/>
<b>Build Description</b>	Automated Schedule Setup	
<b>Terms</b>	2	<b>Associate</b>
<b>Periods</b>	4	
<b>Days</b>	2	
<b>Course Catalog</b>	2011-2012 Course Catalog	

14. Below Parameters, click **Years & Terms**

Edit the years and terms you created through the Auto Scheduler Setup because the name and abbreviation are vague. Also, add years and terms manually by clicking **New**.

<a href="#">New</a>				
Year	Abbrev.	1st Day	Last Day	Edit Terms
Full Year	FY	06/01/2011	05/31/2012	<a href="#">Edit Terms</a>

15. Click **Full Year**

Option	Value
Name of School Year	<input type="text" value="Full Year"/> (example: 2000-2001)
Abbreviation	<input type="text" value="FY"/> (example: 00-01)
First Day of School	<input type="text" value="06/01/2011"/>
Last Day of School	<input type="text" value="05/31/2012"/>

## 16. Enter 2011-2012 in the "Name of School Year" field

The school year, 2011-2012, will be listed in the navigation bar of PowerScheduler as the scheduling year.

## 17. Enter 11-12 in the Abbreviation field

18. Click **Submit**

If you need to edit the term dates, navigate to Years & Terms again. Then, click **Edit Terms**. You can edit the term dates as long as you haven't committed the schedule.

## Setting the Schedule Year

You can make course requests for the current year or for future years. But, you need to identify which schedule year to use for student course requests that come in via the PowerScheduler, Parent Access, or the Modify Future Requests student page.

You set up the schedule year through the Auto Scheduler Setup and modified the year information for clarity. Now set the scheduling year to 2011-2012, the future year, so that students can enter course requests in Parent Access for the 2011-2012 year. In this case, the request screens you create in the PowerScheduler will apply also to the 2011-2012 school year.

1. On the Start Page, click **PowerScheduler**
2. Below Tools, click **Functions > Set Schedule Year**

Sets the schedule year used for scheduling requests.

Years

3. Choose the future schedule year from the menu  
Only the years established on the Years & Terms page are listed.
4. Click **Submit**

## Copying a Master Schedule

If you are loading only students into a schedule, you are either going to build your master schedule manually or you are going to copy a master schedule you used previously.

1. On the Start Page, choose **PowerScheduler**
2. Below Tools, click **Functions > 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	Scheduling High School 1
Source year (the school year that the Master Schedule is being copied from)	<input type="text" value="2011-2012"/>
Check here to confirm you want to proceed.	<input checked="" type="checkbox"/>

3. Choose the year from which you want to copy the master schedule from the Source year menu
4. Select **Check here to confirm you want to proceed.**
5. Click **Submit**

When you copy the master schedule, the system also copies the years and terms

from the schedule. Access the Edit Build Scenario page to verify that the correct years and terms and days and periods are associated with the scenario.

6. Below Processing, click **Scenarios**
7. Select the active scenario
8. Click **Associate** next to the Terms field

Even though you associated the correct terms with the Auto Scheduler Setup, copying the master schedule clears the full-year check box.

9.

The screenshot shows a configuration window for the 2010-2011 school year. At the top, there is a checkbox for '2010-2011' with the dates '09/01/2010 - 06/30/2011'. Below this, there are two checkboxes for 'Semester 1' (dates: '09/01/2010 - 01/20/2011') and 'Semester 2' (dates: '01/21/2011 - 06/30/2011'). The 'Semester 1' and 'Semester 2' checkboxes are checked. A blue 'Submit' button is located at the bottom left of the form.

10. Check **2010-2011 School Year**
11. Click **Submit**
12. Click **Submit**

Before continuing on to your next task, verify that the Years & Terms of the scheduling year have the correct name and dates. Then, verify that the Days and Periods are correct.

## Creating the Course Catalog

If you are a first-time PowerScheduler user, and you complete the Auto Scheduler Setup, you do not need to create a course catalog manually. One reason you would create a new catalog is if you were changing last year's catalog completely. Also, create a new course catalog to keep track of which courses your school offers each year. If you always use the same catalog, the catalog will be overwritten each year, and you will have no way to track the offerings from year to year

1. On the Start Page, click **PowerScheduler**
2. Below Parameters, click **Catalogs > New**
3. Enter a name and description for the catalog
4. Click **Submit**

The course catalog you create appears in the list, but the catalog is not active yet. You can only edit the course catalog associated with the active build scenario.

<a href="#">New</a>				
Catalog	Edit Catalog	Status	Courses	Description
2010-2011 Build and Load	Not active catalog	Inactive	<a href="#">Edit</a>	
2011-2012 Course Catalog	Not active catalog	Inactive	<a href="#">Edit</a>	

- Click **Scenarios**, and select the active scenario

<b>Build Name</b>	2011 - 2012	Active Build <input checked="" type="checkbox"/>
<b>Build Description</b>	Automated Schedule Setup	
<b>Terms</b>	2	<a href="#">Associate</a>
<b>Periods</b>	4	
<b>Days</b>	2	
<b>Course Catalog</b>		

- Choose **2011-2012** from the Course Catalog menu
- Click **Submit**
- Below Parameters, click **Catalogs**
- Click **Edit Course Catalog** in the row of the catalog you created

This screen lists all courses that are either associated to this school or that have previously been added to this catalog directly from the master course file. The **bolded courses** identify those courses that have been associated to the school. Courses currently active for this catalog are so indicated by a checkbox. To add a course to the catalog, click the checkbox(s) and then click submit. To remove a course simply uncheck the box and click submit. To view all courses in the district select the [View Master Course List](#) link.

[View Master Course List](#)

Sort list by: <a href="#">Course Name</a> <a href="#">Course Number</a> <a href="#">Active Status</a>			
<input checked="" type="checkbox"/>	<b>Algebra MAT1100</b>	<input checked="" type="checkbox"/>	<b>Health 11 HE11</b>
<input checked="" type="checkbox"/>	<b>Algebra II mat1101</b>	<input checked="" type="checkbox"/>	<b>Health 12 HE12</b>
<input checked="" type="checkbox"/>	<b>Anatomy/Physiology SCI3000</b>	<input checked="" type="checkbox"/>	<b>Health 9 HE09</b>
<input checked="" type="checkbox"/>	<b>AP American Lit and Comp ENG3000</b>	<input checked="" type="checkbox"/>	<b>Home Ec HEC9</b>
<input checked="" type="checkbox"/>	<b>AP Calculus MAT3000</b>	<input checked="" type="checkbox"/>	<b>Home Repair LS1000</b>

10. By default, the system checks all courses

Clear the check box next to each course you want to remove from the course catalog. New courses added in PowerSchool after you created the catalog will appear unchecked. Select the new courses to make them available for scheduling in the future year.

11. Click **Submit**

## Verifying Schedule Parameters

Verify that you defined periods and days correctly for your master schedule.

### Periods

Complete the following steps to make manual modifications to the default name, abbreviation, and sort order of the periods.

1. On the Start Page, click **PowerScheduler**
2. Below Parameters, click **Periods**

The number of period IDs that appear on the Edit Periods pages depends on the number you choose from the Periods field on the Edit Scenario page. You cannot alter the ID. This ID is listed on the Master Schedule report.

ID	Name	Abbreviation	Core	Sort
1	<input type="text" value="1"/>	<input type="text" value="1"/>	<input checked="" type="checkbox"/>	<input type="text" value="1"/>
2	<input type="text" value="2"/>	<input type="text" value="2"/>	<input checked="" type="checkbox"/>	<input type="text" value="2"/>
3	<input type="text" value="3"/>	<input type="text" value="3"/>	<input checked="" type="checkbox"/>	<input type="text" value="3"/>
4	<input type="text" value="4"/>	<input type="text" value="4"/>	<input checked="" type="checkbox"/>	<input type="text" value="4"/>

3. Enter **Homeroom** in the Name field for ID 4

Many schools have a homeroom period and change the period name to "Homeroom" for easy identification. However, if the period name differs significantly from the ID, staff can become confused. Pearson recommends changing the last period to Homeroom and using the sort order to list it first.

4. Enter **HR** in the Abbreviation field for ID 4
5. Choose **1** from the Sort menu for ID 4, **2** from the Sort menu for ID 1, **3** from the Sort menu for ID 2, and **4** from the Sort menu for ID 3

This will reorder all the periods, so Homeroom will be listed first.

6. Click **Submit**
7. Click **Periods**

Your periods should look similar to the image below. Notice that the IDs match the majority of the names. When the ID is listed, you know right away which period it correlates to.

ID	Name	Abbreviation	Core	Sort
4	<input type="text" value="Homeroom"/>	<input type="text" value="HR"/>	<input checked="" type="checkbox"/>	<input type="text" value="1"/>
1	<input type="text" value="1"/>	<input type="text" value="1"/>	<input checked="" type="checkbox"/>	<input type="text" value="2"/>
2	<input type="text" value="2"/>	<input type="text" value="2"/>	<input checked="" type="checkbox"/>	<input type="text" value="3"/>
3	<input type="text" value="3"/>	<input type="text" value="3"/>	<input checked="" type="checkbox"/>	<input type="text" value="4"/>

## Days

Complete the following steps to make manual modifications to the default name and abbreviation of the days.

1. On the Start Page, click **PowerScheduler**
2. Below Parameters, click **Days**

Use the Auto Scheduler Setup or Edit Scenario page to determine the number of day IDs that appear.

ID	Name	Abbreviation
A	<input type="text" value="A"/>	<input type="text" value="A"/>
B	<input type="text" value="B"/>	<input type="text" value="B"/>

3. Enter the name and abbreviation for each day

Changing the default name and abbreviation is optional.

4. Click **Submit**

## Section Types

Use Section Types to differentiate sections of a course. For example, the freshman PE course needs a section for male students and a section for female students. Other possible section types are Honors and Bilingual. Assign the section type to the individual sections and student requests. Then, when PowerScheduler loads students into the master schedule, it filters students with the appropriate section type into the appropriate section.

1. On the Start Page, click **PowerScheduler**
2. Below Parameters, click **Section Types > New**
3. Enter a name and code for the section type
4. Click **Submit**

## Teacher Teams

Use the Teams method to group students together. Additionally, some schools use teams to monitor student progress. Teams fall into two categories: static or dynamic. To create static teams, assign each student and teacher to a team manually. To create dynamic teams, assign teachers to a team. Then, the engine assigns students to the appropriate team for the best balance.

1. On the Start Page, click **PowerScheduler**
2. Below Parameters, click **Teams > New**
3. Enter a name for the team
4. Click **Submit**

If you decided to mass assign students to teams, you will need the ID.

<a href="#">New</a>	
ID	Team
752	Blue
751	Orange

## Step B: Defining Course and Section Information

Create any new courses you are offering and associate them with the appropriate school. However, you need to define more course information than just adding a course to the catalog. You also need to define course parameters for scheduling, such as load priority and course maximums. Defining course information is the most complex set of preferences for any item in PowerScheduler. The preferences page is very long and contains many fields, but you probably won't need to complete every field.

To define the parameters, you can do any of the following:

- Enter parameters for each course individually
- Use the "Auto Fill Course Information" function to enter parameters for selected courses at the same time
- Use the "Auto Generate Course Information" function to copy specific preferences for all your courses in the master schedule into your active PowerScheduler catalog

You must copy a master schedule first.

### Adding a New Course

Add courses on the live side of PowerSchool, not in PowerScheduler. Also, avoid adding duplicate courses. Verify that courses aren't already in the Master Course List before adding them.

1. On the Start Page, click **School > Courses > + New Course**

Course Name	<input type="text"/>
Course Number	<input type="text"/>
Alternate Course Number	<input type="text"/>
Credit Hours	<input type="text"/>
CIP Code	<input type="text"/> <input type="checkbox"/> Vocational Class
Credit Type	<input type="text"/> (no spaces)
Default Maximum Enrollment	<input type="text"/>
Course Notes	<input type="text"/>
Grade Scale	Default <input type="button" value="v"/>
GPA Added Value Points	0 <input type="text"/> (usually zero)
Exclude from GPA?	<input checked="" type="radio"/> Include <input type="radio"/> Exclude
Exclude from Class Rank?	<input checked="" type="radio"/> Include <input type="radio"/> Exclude
Exclude from Honor Roll?	<input checked="" type="radio"/> Include <input type="radio"/> Exclude
Use The Course For Lunch	<input type="checkbox"/>

2. Enter information in the fields
3. Click **Submit**

## Course Prerequisites

The prerequisite setup establishes the requirements that a student must meet before requesting a course. You can do more than associate two courses together. You can specify that a student must earn a particular grade in order to request the next course. You can require that the student earn a certain number of credits before he or she can request the next course. You can even require that a teacher submits a recommendation before the student can request the course. You have access to the following prerequisites rules:

- Letter Grade
- Percent Grade
- Average Percent Grade
- Credit Hours
- Concurrent Request
- Recommend
- Any of
- None of

Keep in mind that prerequisites limit the requests students can select on the request pages. Prerequisites do not stop the PowerScheduler engine from loading a course into the student's schedule.

## Adding Course Prerequisites

Since students submit most requests before the end of second semester, you could define the rule based on the assumption that the student will complete the course. For example, a set of prerequisite rules may specify that students must take Chemistry I prior to Physics I, and that students must earn an A, B, or C letter grade in Chemistry I before requesting Physics I.

The course requirements are the results of two prerequisite rules between Chemistry I and Physics I. Add prerequisites on the live side of PowerSchool.

1. On the Start Page, click **School > Courses**
2. Find and select **Physics I**
3. Click the Prerequisites tab
4. Enter **Completion of Chemistry I** in the Prerequisite Note field
5. Click the **+** sign in the Prerequisites rules section
6. Choose **Letter Grade** from the menu

**Add New Letter Grade Rule** ✕

Require the student to have passed another class with one of the specified letter grades.

**Course Number:**

**Store Codes (blank for any):**

**List of Grades:**

**If the Student Retakes:** One must pass ⌵

**Presume Completion:**

The course which the student needs to have passed

Make Defaults
Cancel
Add

7. Enter the beginning of the course number (a list of matching courses will appear)
8. Select the course
9. Enter **A, B, C** in the List of Grades field
10. Choose **One must pass** from the "If the Student Retakes" menu
11. Check **Presume Completion**, and click **Add**

Check Presume Completion to ignore the prerequisite rule and allow students to request the class without completing the prerequisite. To add flexibility to the Presume Completion, navigate to **School > Final Grade Setup**. At the bottom of the Final Grade Setup page, enter the number of days to extend the Presume

Completion beyond the end of the term. Also, enter a negative number to stop the Presume Completion before the course ends.

12. Click the **+** sign again
13. Choose **Recommend** from the menu

If the student must pass *or* receive a recommendation, choose the "Any Of" rule. Then, repeat steps 12 and 13 again. The Any Of rule states the student must meet one of the prerequisites, not all.

14. Enter the department of the teacher, such as **sci**
15. Click **Add**
16. Finally, click **Save**

## Defining Course Preferences Manually

Although all schools can define course preferences manually, the number of manual changes can vary. Smaller schools may choose to enter all preferences one at a time. Larger schools may use the Auto Fill and Auto Generate functions to complete the Preferences page, then make individual changes. Notice the static fields on the Preferences page that you cannot change. The static fields are copied from the Master Course List on the active side, and can be changed only on the active side.

The Preferences page is divided into six sections: General Information, Scheduling Preferences, Sections Defined, Labs Defined, Load Options, and Substitute Information. You can fill out the Preferences section any number of ways since each course has different requirements. But, typically you will fill out Scheduling Preferences and Sections Defined for every course.

The Scheduling Preferences section includes the fields for the department associated with the course and the maximum enrollment. The Sections Defined section includes many section characteristics including the number of sections offered and the valid start periods and terms.

1. On the Start Page, click **PowerScheduler**
2. Below Resources, click **Courses**
3. Click a course name

Preferences is the default tab on the Course Information page. You should complete this page first.

The following steps focus on course preferences, but there are four other course tabs. The Constraints tab lists any constraints entered for the course. The Relationships tab is where you enter any relationships between the course and other courses. The Requests tab lists all requests submitted for the course. The Sections tab lists the available sections of the course.

[Assignments](#) | [Constraints](#) | [Preferences](#) | [Relationships](#) | [Requests](#) | [Sections](#)

General Information			
Course Number	MAT1100	Course Name	Algebra
Credit Hours	<input type="text" value="1"/>	Credit Type	MAT
Alternate Course Number		Grade Scale	
CIP Code		Vocational Class	No
Scheduling Preferences			
Schedule This Course	<input checked="" type="checkbox"/>		
Use The Course For Lunch	<input type="checkbox"/>		
Exclude On Report Cards/Transcripts	<input type="checkbox"/>		
Department	<input type="text" value="Math"/>	<input type="button" value="Associate"/>	
Build Type	<input type="text" value="Standard"/>		
Full Catalog Description	<input type="text"/>		
Maximum Enrollment	<input type="text" value="25"/>		
Sections Defined			
Sections Offered	<input type="text" value="1"/>		
Periods Per Cycle	1		
Periods Per Meeting	<input type="text" value="1"/>	Frequency	<input type="text" value="1"/>
Terms per year	2 of 2		
Allow Student Repeats in the Same Term	<input type="checkbox"/>	Allow Student Repeats in Different Terms	<input type="checkbox"/>
Balance Terms	<input type="checkbox"/>		
Valid Start Periods	<input type="checkbox"/> Period 1 <input type="checkbox"/> Period 2 <input type="checkbox"/> Period 3 <input type="checkbox"/> Period 4		
Valid Terms	<input type="text" value="FY"/>	<input type="button" value="Associate"/>	
Valid Day Combinations	<input type="text"/> Example: (A,B)(B,D)		

Labs Defined	
Is This Course A Lab	<input type="checkbox"/>
Lab Frequency	<input type="text" value="0"/>
Lab Periods Per Meeting	<input type="text" value="0"/>
Valid Lab Day Combinations	<input type="text"/> Example: (A,B)(B,D)
Room Requirements	
Facilities	<input type="text"/> <input type="button" value="Associate"/>
Load Options	
Load Priority	<input type="text" value="0"/>
Load Type	Academic <input type="button" value="v"/>
Balance Priority	Section <input type="button" value="v"/>
Use Pre Established Teams	<input type="checkbox"/>
Close Section After Max	<input type="checkbox"/>
Use Section Types	<input type="checkbox"/>
Substitute Information	
Don't Allow Student Substitutions	<input type="checkbox"/>
Global Substitution 1	<input type="text"/> <input type="button" value="Associate"/>
Global Substitution 2	<input type="text"/> <input type="button" value="Associate"/>
Global Substitution 3	<input type="text"/> <input type="button" value="Associate"/>

4. Check **Schedule This Course** for every course you offer

PowerScheduler ignores any courses that don't have Schedule This Course checked. The remaining fields in the Scheduling Preferences: Sections Defined, Labs Defined, and Room Requirements sections are optional and apply to the Build process.

5. Enter a load priority for every course in the Load Priority field

Use Load Priority to load students into higher priority courses first. For example, AP Chemistry is an advanced class with one section. So, AP Chemistry needs a higher priority. You can enter the following load priority values: 1, 3, 7, 15, 31, and 63. The lower the number, the higher the priority. Electives traditionally have a higher number so that the engine schedules the required courses first and electives last.

6. Choose **Academic** from the Load Type menu

You have two additional Load Type options: Elective and Alternate. The system uses the load type to keep the types of courses balanced across terms. This way, students won't have all their academic courses first semester and elective courses second semester.

7. Choose one of the following options from the Balance Priority field:

- a. Choose **Section** to keep the number of students balanced across sections
- b. Choose **Gender** to keep the number of males and females balanced in each section
- c. Choose **Grade** to keep the grade levels balanced in each section
- d. Choose **EthnicCode** to keep the ethnicities balanced in each section
- e. Choose **House** to keep the members of each house balanced in each section

Balance priority is the secondary priority field to keep sections balanced.  
Section is the default value.

8. Check **Use Pre Established Teams** if the course uses teams
9. Check **Close Section After Max**

If the check box isn't selected, the section's "Close section at max" check box won't be selected either. As a result, a section could be overfilled.

10. Check **Use Section Types** if the course uses section types
11. Check **Don't Allow Student Substitutions** if the course cannot be substituted with another course

Clear the "Don't Allow Student Substitutions" check box if you want to allow substitutions. If you check "Don't Allow Student Substitutions," you don't need to complete the remaining field.

12. If this course has a global substitution, click **Associate** next to the Global Substitutions 1 field
13. In the Choices Dialog window, select the substitute course, and click **Submit**
14. Use the Global Substitution 2 and 3 fields to define subsequent substitutes
15. Click **Submit**

## Auto-Filling Course Information

The "Auto Fill Course Information" function enters course information simultaneously for all courses or selected courses. Pearson recommends using the Auto Fill Course function, but be careful. After completing the Auto Fill function, use the Course List report to view the information you auto-filled, as well as information that may be missing. If you want to auto fill all courses, skip steps 2-5 in the following instructions.

1. On the Start Page, click **PowerScheduler**
2. Below Tools, click **Functions > Update Selections**
3. Choose **ScheduleCourseCatalogs** from the Current Table menu
4. Click **Select all [x] records in this school**
5. Do one of the following:
  - a. Click **Select Records by Hand**, select the courses you want to auto-fill with the course information, and click **Submit**

- b. Use the Search ScheduleCourseCatalogs fields to search for and select courses that meet specific criteria, such as all courses in the English department
6. Below Tools, click **Functions > Auto Fill Course Information**
7. Apply the changes to all courses or those you just selected
8. Complete all the fields that need to be auto-filled for the courses you selected

The information you enter will vary depending on the courses.

9. Click **Submit**

## Auto-Generating Course Information

To use the "Auto Generate Course Information" function, you must first copy your master schedule from last year. Auto Generate will overwrite any course changes you have already defined for the new scenario.

1. On the Start Page, click **PowerScheduler**
2. Below Tools, click **Functions > Auto Generate Course Information**
3. Check **Select check box to verify the command** to verify that you want to copy scheduling parameters from the courses in the current year's master schedule to the courses for next year's master schedule
4. Click **Submit**

## Defining Course Relationships

After you enter course information, you can define relationships between courses. Relationships alert the system that it must consider other courses when determining the best place for a course in the student schedule. Use relationships to ensure student schedules are loaded correctly. If you define a relationship for a course with another course, you do not need to define the relationship for both courses.

You can create several types of course relationships in PowerScheduler. Relationships either apply to the build or load. Use any of the following Load course relationships:

- Has a Load Coreq of – courses scheduled during the same term
- Has a Load Postreq of – courses scheduled after the related course
- Has a Load Prereq of – course scheduled before the related course
- Must Not Load Coreq With – courses not scheduled during the same term
- Must Load Distinct (no term overlap) With – courses not loaded into overlapping terms
- Must Load the Term After – courses loaded after, in sequential terms
- Must Load the Term Before – courses loaded before, in sequential terms

The Coreq, Postreq, and Prereq relationships only relate to the current scheduling year. PowerScheduler does not check historical data for previous courses. The following steps outline how to create a relationship, but do not cover each relationship individually.

1. On the Start Page, click **PowerScheduler**
2. Below Resources, click **Courses**
3. Choose **Relationships** from the menu at the top of the course list
4. Click the name of the course for which you want to define a relationship, and click **New**

The image shows a web form for defining a relationship between courses. The form includes the following fields and a dropdown menu:

- Option**: A text input field.
- Course Number**: A text input field.
- Relationship Type**: A dropdown menu with the following options:
  - Is Blocked for Building With
  - May Be Built Concurrent With
  - Has a Load Coreq of
  - Has a Load Postreq of
  - Has a Load Prereq of
  - Must Not Load Coreq With
  - Must Load Distinct (no term overlap) With
  - ✓ Must Load the Term After (selected)
  - Must Load the Term Before
- Relationship Code**: A text input field with a dropdown arrow on the right.
- Submit**: A blue button at the bottom left.

5. Click **Associate** to select the course you are relating to the course
6. Choose **Must Load the Term After** from the Relationship Type menu

The available types can be seen in the image above. Keep in mind, the Prereq relationship type is separate from the prerequisites rules and notes entered earlier.

7. Click **Submit**

## Step C: Defining Rooms

Your school's layout and classrooms are an essential part of the scheduling process. Create or update your rooms, and associate the appropriate facilities and departments with each room. Associating rooms with teachers is optional, and will not apply to all schools.

When defining rooms, you can do any combination of the following:

- Define and update your rooms one at a time
- Auto-generate rooms from your existing master schedule
- Auto-create rooms with a predefined set of criteria
- Use the Update Selections function to update one field of information for a group of rooms at one time

### Defining Rooms Manually

Depending on the size of the school, create or edit your rooms one at a time.

1. On the Start Page, click **PowerScheduler**
2. Below Resources, click **Rooms**
3. Click **New** to create a new room, or click the room number to edit an existing room

Option	Value
Room Number	<input type="text" value="2"/>
Room Description	<input type="text" value="2"/>
Department	<input type="text" value="Art"/> <b>Associate</b>
Building	<input type="text"/> <b>Associate</b>
House	<input type="text"/> <b>Associate</b>
Use for Scheduling	<input checked="" type="checkbox"/>
Room is Always Free	<input type="checkbox"/>
Department Use Only	<input checked="" type="checkbox"/>
Facility Use Only	<input type="checkbox"/>
Room Facilities	<input type="text"/> <b>Associate</b>
Room Maximum	<input type="text" value="25"/>
<b>Submit</b>	

4. Enter a Room Number, Room Description, and Room Maximum

The Room Maximum field is essential. Make sure that the course maximum does not exceed the room maximum.

5. Click **Associate** for the Department field, and select a department
6. Check **Use for Scheduling**
7. Click **Submit**

## Auto-Creating Rooms

You can create rooms all at once with the Auto Create Rooms function. Once the system creates the list, you can go back to each room and modify names and other information.

1. On the Start Page, click **PowerScheduler**
2. Below Tools, click **Functions > Auto Create Rooms**

Option Name	Value
Start Number	<input type="text" value="100"/>
Increment Number	<input type="text" value="1"/>
Number of Rooms	<input type="text" value="20"/>
Room Prefix	<input type="text"/>
Field Name	Value
Department	<input type="text"/> <b>Associate</b>
Building	<input type="text"/> <b>Associate</b>
House	<input type="text"/> <b>Associate</b>
Use for Scheduling	Yes <input type="button" value="v"/>
Room is Always Free	No <input type="button" value="v"/>
Department Use Only	No <input type="button" value="v"/>
Facility Use Only	No <input type="button" value="v"/>
Room Facilities	<input type="text"/> <b>Associate</b>
Room Maximum	<input type="text"/>

3. Enter a start number, increment number, and number of rooms
4. Choose **Yes** from the Use for Scheduling menu
5. The remaining fields are optional and may or may not apply, depending on the group of rooms you are creating

For example, you are creating rooms for a new wing of the school, but the room maximums vary. Leave the Room Maximum field blank or enter the most common maximum, and change the exceptions after auto-creating.

- Click **Submit** so the system will create the rooms with the scheduling information you defined

## Auto-Generating Rooms

To use the Auto Generate Rooms function, you must have defined rooms in a previous year and copied the master schedule from that year. Only first-time PowerScheduler users need to perform the Auto Generate Rooms function. Auto Generate overwrites any manual changes or rooms you created for the new schedule year.

- On the Start Page, click **PowerScheduler**
- Below Tools, click **Functions > Auto Generate Rooms**

This function will generate rooms for the current build using the existing master schedule for Apple Grove High School 1.

Select checkbox to verify the command

**Submit**

- Check **Select check box to verify the command** to copy all rooms from the current year's master schedule to the new master schedule
- Click **Submit**

## Modifying Room Data using Update Selections

- On the Start Page, click **PowerScheduler**
- Below Tools, click **Functions > Update Selections**

Current Table:

Current Records in Selection: 42 [List View](#) [Modify Records](#) [Select Records by Hand](#)

**Select all 42 records in this school**

**Search ScheduleRooms**

=

=

**Search all 42 records in this school** **Search within the current 42 records only**

3. Choose **ScheduleRooms** from the Current Table menu
4. Do one of the following:
  - a. Click **Select all [#] records in this school** to select all rooms
  - b. Use the Search ScheduleRooms fields to search for and select rooms that meet specific criteria, such as all rooms in the English department
5. Click **Modify Records**
6. Choose the room field you want to edit from the menu

For example, all the rooms in the English departments need the same room maximum. Choose **Maximum**.

7. Enter a value for the selected rooms, such as 30
8. Click **Modify Selected Records**

Current Table: ScheduleRooms

Current number of records in selection: 54

Maximum := 30

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**

## Step D: Preparing Student and Teacher Information

### Student Information

In PowerScheduler, “student information” doesn’t refer to addresses and phone numbers. Instead, student information refers to scheduling preferences, such as next year grade. You must define student information for successful scheduling. For example, the “Next Year Grade” field not only tells PowerSchool what grade level the student will have next year, but also which request form to associate to the student.

Before you can start scheduling your students, you need to get your students into PowerScheduler. Begin the process on the PowerSchool side with the Scheduling Setup student page.

1. On Start Page, search for and select a student
2. Click **Scheduling Setup**

As you enter new students into PowerSchool, complete the Scheduling Setup page as part of the data entry process. Then, each year the Scheduling Setup page will update with the end of year process. You need to complete several fields, but only one field places a student in PowerScheduler: the Next School Indicator.

Required Settings	
Next Year Grade	<input type="text" value="11"/>
Priority	<input type="text" value="0"/>
Schedule This Student	<input type="checkbox"/>
Year of Graduation	<input type="text" value="2013"/>
Summer School Indicator	<input type="text" value="None"/>
Note for Summer School Admin	<input type="text"/>
Next School Indicator	<input type="text" value="Apple Grove High School"/>
Optional Settings	
Next Year Campus/Building	<input type="text"/> <input type="button" value="Associate"/>
Next Year House	<input type="text"/> <input type="button" value="Associate"/>
Next Year Team	<input type="text"/>
<input type="button" value="Submit"/>	

3. Choose **Apple Grove High School** from the “Next School Indicator” menu

If you don’t have options in the Next School Indicator menu, navigate to the Start Page. Click **School > Next School > New** to add the next school options.

4. Click **Submit**

You don’t have to set this field manually for every student. Use the Next School Indicator group function to set this field for an entire grade level. Pearson recommends using the group function on a regular basis to catch any new student records that might be missing this information. Remember when running the group function for the highest grade level in your school, those students will be graduating or moving to a different school. The remaining fields on the Scheduling Setup page will be covered in the next section.

You must enter scheduling preferences before your students start submitting requests. If you don’t enter the preferences, students will have access to the wrong request forms or no form at all. You can enter or update student scheduling preferences using any of the following methods:

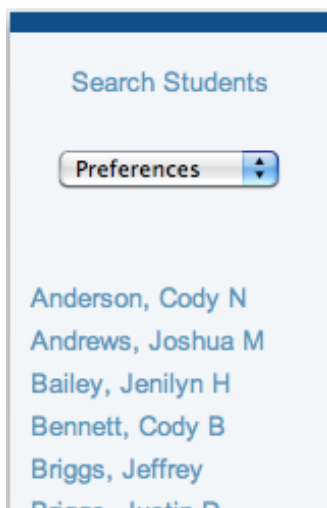
- Manually update or enter scheduling preferences for each student, one at a time
- Auto-fill scheduling preferences for students by year of graduation
- Use the Update Selections function to update specific fields of information for several students at one time

## Updating Student Scheduling Preferences Manually

Depending on the size of the school body, update scheduling preferences one at a time. However, manually updating takes the most time.

1. On the Start Page, click **PowerScheduler**
2. Below Resources, click **Students**
3. Search for and select a student or group of students

The students you select appear in the students menu.



- Choose **Preferences** from the menu at the top of the student list, and click a student's name

[Constraints](#) | [Demographics](#) | [Grad Planner](#) | [Grad Progress](#) | [Matrix](#) | [Preference](#) | [Requests](#) | [Schedule](#)

**Required Settings**

Next Year Grade	<input type="text" value="10"/>	
Priority	<input type="text" value="0"/>	
Schedule This Student	<input checked="" type="checkbox"/>	
Year of Graduation	<input type="text" value="2014"/>	
Next School Indicator	<input style="width: 100%;" type="text" value="Apple Grove High School"/>	

**Optional Settings**

Next Year Building	<input type="text"/>	<input type="button" value="Associate"/>
Next Year House	<input type="text"/>	<input type="button" value="Associate"/>
Next Year Team	<input type="text"/>	

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- Enter the next year grade or verify that grade already entered is correct

The Next Year Grade field indicates the request screen each student will use to submit his or her course requests for the next school year and which grade level the student will promote to.

- Enter a number in the Priority field or verify that the priority already entered is correct

Use the Priority field to tell PowerScheduler which students to schedule first. For example, upcoming seniors need a higher priority than upcoming freshman. The lower the number, the higher the priority. Pearson recommends using the priorities 10, 20, 30, and 40. If you have one senior that needs a higher priority than the rest of the grade, enter the priority 9. Use the priority gaps for scheduling flexibility.

- Verify that **Schedule This Student** is checked for every student you want to schedule

The Schedule This Student check box includes the student in the Load Process.

- Enter the student's graduation year in the Year of Graduation field
- Verify the Next School Indicator field is correct
- Complete the Optional Settings if your school uses Buildings, Houses, and Teams

11. Click **Submit**
12. Repeat steps 5-11 to enter scheduling preferences for each of the students you select

## Auto-Filling Student Scheduling Preferences

Use the "Auto Fill Student Information" function to fill student information simultaneously for a group of students. Pearson recommends using the Auto Fill function before you set your retentions.

1. On the Start Page, click **PowerScheduler**
2. Below Tools, click **Functions > Auto Fill Student Information**

The "Auto Fill Student Information" page is always blank and does not store the information you auto filled last.

Field Name	Grade 8	Grade 9	Grade 10	Grade 11	Grade 12
Next Year Grade	<input type="text" value="9"/>	<input type="text" value="10"/>	<input type="text" value="11"/>	<input type="text" value="12"/>	<input type="text" value="99"/>
Priority	<input type="text" value="40"/>	<input type="text" value="30"/>	<input type="text" value="20"/>	<input type="text" value="10"/>	<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="No Change"/>
Year of Graduation	<input type="text" value="2016"/>	<input type="text" value="2015"/>	<input type="text" value="2014"/>	<input type="text" value="2013"/>	<input type="text" value="2012"/>

3. Enter values similar to those in the image above

When completing the page, remember that graduating seniors don't need to be scheduled.

4. Click **Submit**

## Updating Student Scheduling Preferences using Update Selections

1. On the Start Page, click **PowerScheduler**
2. Below Tools, click **Functions > Update Selections**

Current Table:

Current Records in Selection: 397 [List View](#) [Modify Records](#) [Select Records by Hand](#)

**Select all 397 records in this school**

**Search Students**

=

=

**Search all 397 records in this school** **Search within the current 397 records only**

3. Choose **Students** from the Current Table menu
4. Do one of the following:
  - a. Click **Select all [#] records in this school** to select all students
  - b. Click **Select Records by Hand** to select a specific group of students
  - c. Use the Search Students fields to search for and select students that meet specific criteria, such as all students graduating in 2011
5. Click **Modify Records**
6. Choose the student field you want to edit from the menu

For example, to identify the team the selected students will be scheduled with next year, choose the **Sched\_NextYearTeam** field.

7. Enter a value in the blank field, such as the team ID

You can find this ID number by clicking **Teams** below Parameters.

8. Click **Modify Selected Records**

Current Table: Students

Current number of records in selection: 125

:=

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**

## Teacher Information

Define teacher scheduling information for every teacher who instructs at least one course at your school. You can also assign teachers to the courses they will teach. Remember, in order to schedule a teacher, you must make the teacher active in the system. You can either enter teacher information and assignments manually or auto-fill information and auto-generate assignments.

Before you start entering teacher assignments, you need to get your teachers into PowerScheduler. Begin on the PowerSchool side.

1. On Start Page, click **Staff Search**
2. Search for and select the staff member
3. Click **Schedule Setup**

Required Settings	
Department	<input type="text"/> <b>Associate</b>
Preferred Room	<input type="text"/> <b>Associate</b>
Maximum Consecutive Periods	<input type="text" value="1"/>
Maximum Periods Free	<input type="text" value="1"/>
Schedule This Teacher	<input type="checkbox"/>
Is Always Free?	<input type="checkbox"/>
Optional Settings	
Building Code	<input type="text"/> <b>Associate</b>
House Code	<input type="text"/> <b>Associate</b>
Team Code	<input type="text"/>
Maximum Student Load	<input type="text" value="0"/>
<b>Submit</b>	

4. Check **Schedule This Teacher**

If a teacher won't be returning next year, clear the Schedule This Teacher check box.

5. Click **Submit**

You don't have to complete this field manually for every teacher. Use the "Set Staff Field Value" group function to set this field for all teachers. The next section covers the remaining fields on the Schedule Setup page.

## Entering Teacher Information Manually

The majority of information for teacher scheduling preferences is unique to each teacher. Entering scheduling preferences one at a time is practical.

1. On the Start Page, click **PowerScheduler**
2. Below Resources, click **Teachers**
3. Choose **Preferences** from the menu at the top of the teacher list, and click a teacher's name

Assignments   Constraints   Matrix   Preferences   Schedule	
<b>Required Settings</b>	
Department	Art <input type="button" value="Associate"/>
Preferred Room	120 <input type="button" value="Associate"/>
Maximum Consecutive Periods	3 <input type="button" value="v"/>
Schedule This Teacher	<input checked="" type="checkbox"/>
Is Always Free?	<input type="checkbox"/>
Schedule For Lunch	<input type="checkbox"/>
<b>Optional Settings</b>	
Building Code	<input type="text"/> <input type="button" value="Associate"/>
House Code	<input type="text"/> <input type="button" value="Associate"/>
Team Code	<input type="button" value="v"/>
Maximum Student Load	0 <input type="text"/>

4. Click **Associate** next to the Department field to associate the teacher with a specific department
5. Click **Associate** next to the Room field to associate the teacher with a specific room, but remember that this is a preference only
6. Choose a value from the Maximum Consecutive Periods menu as mandated by the administration

The Maximum Consecutive Periods menu defaults to 1. Pearson recommends not using the default value.

7. Verify the Schedule This Teacher check box is selected

If a teacher won't be returning next year, clear the Schedule This Teacher check box.

8. Complete the remaining fields (the information you enter will vary depending on the teacher)
9. Click **Submit**

## Auto-Filling Teacher Information

Use the "Auto Fill Teacher Information" function to fill in teacher information simultaneously for all teachers or selected teachers. If you want to auto fill all teachers, skip steps 2-4 in the following instructions.

1. On the Start Page, click **PowerScheduler**
2. Below Tools, click **Functions > Update Selections**
3. Choose **Teachers** from the Current Table menu
4. Do one of the following:
  - a. Click **Select Records by Hand**, select the teachers you want to auto fill with teacher information, and click **Submit**
  - b. Use the Search Teachers fields to search for and select teachers who meet specific criteria, such as all teachers in the English department
5. Below Tools, click **Functions > Auto Fill Teacher Information**

<b>Apply To:</b>	<input type="radio"/> All teachers set for scheduling <input checked="" type="radio"/> The selected 16 teachers
<b>Field Name</b>	<b>Value</b>
<b>Department</b>	<input type="text" value="English"/> <b>Associate</b> <input type="checkbox"/> Clear Value
<b>Preferred Room</b>	<input type="text"/> <b>Associate</b> <input type="checkbox"/> Clear Room
<b>Maximum Consecutive Periods</b>	<input type="text" value="No Change"/>
<b>Schedule for Lunch</b>	<input type="text" value="No Change"/>
<b>Schedule This Teacher</b>	<input type="text" value="No Change"/>
<b>Is Always Free?</b>	<input type="text" value="No Change"/>
<b>Submit</b>	

6. Apply the changes to all teachers or those you just selected
7. Complete the fields you want to auto fill for the selected teachers

For example, click **Associate** next to the Department field to assign the eight teachers to the English department.

8. Click **Submit**

## Step E: Entering Student Course Requests

Completing all the previous steps before entering student course requests for next year is very important. This does not mean completing the optional steps, but performing the Auto Scheduler setup, completing the course catalog, defining course and section information, and entering student and teacher information.

### Defining Grade-Level Requirements

Rather than jumping right in, spend some time researching and gathering course information. Outline the grade-level course requirements to save time and errors throughout the process. First, collect the following information for each grade level:

- Required courses
- Number of credits students must earn
- Possible semester elective courses
- Possible yearlong elective courses
- Possible no-credit courses
- Number of terms for each request
- Before- or after-school courses
- Possible lunch periods

Take the time to gather requirement information first so you can perform all of the following steps quickly. Use requirement information to create course groups and course request pages for each grade level.

### Course Recommendations

Teacher recommendations are another element of the request process. Certain courses will require a teacher's recommendation prior to submitting course requests. Teachers submit their recommendations in PowerTeacher. (You can edit and delete recommendations that teachers have submitted.) Administrative staff submits recommendations in Request Management on the student pages.

1. On the Start Page, search for and select a student
2. Click **Request Management > Manage Recommendations**
3. If the teacher submitted a recommendation for the student, that recommendation will be listed on the Manage Recommendations student page
4. Click the Pencil icon to make changes or to delete the recommendation
5. To enter a new recommendation, click **Create New Recommendation**
6. Enter the beginning of the course number in the Course Number field, such as **MAT**
7. Choose the correct math class
8. Choose **11-12**, your future scheduling year, from the Scheduling Year menu
9. Enter a comment describing the recommendation in the Comments field, such as **Teacher recommends placement in this class**

10. Click **Submit**

## Creating Course Groups

Use Course Groups to organize courses into groups that satisfy specific requirements like Math or English. Create course groups to apply to your student request screens. For example, every student must select an English class from the English course group. You can create as many course groups as needed.

1. On the Start Page, click **PowerScheduler**
2. Below Requesting, click **Course Groups**
3. Choose the order in which you want courses to be listed on the student course request pages from the menu

Note: You can sort courses by name or number.

4. Click **New** at the top of the course list

Option	Value
Name	<input type="text" value="Grade 11 English"/>
Type	<input type="text" value="Scheduling Only"/>
Applies to	<input type="radio"/> all schools <input checked="" type="radio"/> Apple Grove High School 1
Show Courses: <a href="#">School Master Schedule</a>   <a href="#">Current Catalog</a>	
<input type="checkbox"/> MAT1100 Algebra	<input type="checkbox"/> HE10 Health 10
<input type="checkbox"/> mat1101 Algebra II	<input type="checkbox"/> HE11 Health 11
<input type="checkbox"/> SCI3000 Anatomy/Physiology	<input type="checkbox"/> HE12 Health 12
<input checked="" type="checkbox"/> ENG3000 AP American Lit and Comp	<input type="checkbox"/> HE09 Health 9
<input type="checkbox"/> MAT3000 AP Calculus	<input type="checkbox"/> HEC9 Home Ec
<input type="checkbox"/> SOC3100 AP History	<input type="checkbox"/> LS1000 Home Repair
<input type="checkbox"/> ART9 Art	<input type="checkbox"/> PE2100 Individual Sports
<input type="checkbox"/> 18001 Band	<input type="checkbox"/> ART1000 Intro to Art
<input type="checkbox"/> TUB1000 Business Activities	<input checked="" type="checkbox"/> ENG1100 Journalism

5. Click **Current Catalog**

Pearson recommends using the Current Catalog—the catalog from PowerScheduler, not the School Master Schedule—when creating your course groups. Use the Current Catalog to ensure that a course group doesn't contain classes that aren't offered anymore.

6. Enter a name for the course group
7. Choose **Scheduling Only** from the Type menu
8. Select where to apply the course group: all schools or the current school
9. Check the name of each course that belongs to the course group
10. Click **Submit**

## Creating Student Course Request Pages

You must create new request pages every year. Creating the pages requires several steps. Click the name of the course request page for a grade level. Then, add requirements to each page by creating single course, multi-course, and/or core requirements. Finally, preview the page to make sure it works correctly. Remember, course requests are linked to the student's next year grade level.

1. On the Start Page, click **PowerScheduler**
2. Below Requesting, click **Screen Setup**
3. Click the appropriate grade level in the Requests menu

For example, to create a course request page for next year's 9th graders, click **Grade 9**.

This grade may register for classes [Preview Student Registration Screen](#)

Message to display on registration screens for students in this grade:

Number of credit hours each student must submit (excluding alternate requests) Minimum:  Maximum:

Instructions and options presented to students in this grade

[New Single Course Requirement](#) [New Multi-Course Requirement](#) [New Core Requirement](#)

Sort Order	Requirement Name	Type	Course Group
<a href="#">Submit</a>			

4. Enter the minimum and maximum number of credit hours each student must request to complete the page

Entering values for minimum and maximum credit hours prevents students from over scheduling or under scheduling, but using these fields is optional.

5. Enter the message you want to display on the request screen in the text box
6. Click **Submit**

## Creating Requirements

Requirements make up the body of the request page, informing students which courses they must take and offering them selections from course groups. The three types of requirements are.

- Single course requirement
- Multi-course requirement
- Core requirement

## Single Course Requirements

Use a single course requirement when students need to make one selection from a course group. For example, juniors must choose one English class from a list of possible English classes.

1. On the Start Page, click **PowerScheduler**
2. Below Requesting, click **Screen Setup**
3. Click the appropriate grade level from the Requests menu
4. Click **New Single Course Requirement**

Single-Course Requirement	
Name of this requirement	<input type="text" value="11th Grade English Class"/>
Description/Instructions This information will be presented to the student as instructions on how to comply with this requirement	<input type="text" value="You must choose one course."/>
List of courses to present to the student in the pop-up menu	<input type="text" value="Grade 11 English"/>
Must students select a course from the pop-up, or may they leave it blank?	<input type="text" value="Must select one"/>
Message to display if students are required to select a course, but they leave it blank instead (leave blank for a generic message)	<input type="text" value="You forgot to select an English class!"/>
Request type (alternates will be used if an elective cannot be filled)	<input type="text" value="Required"/>
Number of requests to generate	<input type="text" value="1"/>
Item sort order (affects display only)	<input type="text" value="2"/> (a number from 0 to 100)
<input type="button" value="Delete"/> <input type="button" value="Submit"/>	

5. Enter a requirement name, description, message to display if the requirement isn't completed correctly, and sort order
6. Choose a valid course group for the requirement
7. Choose if the student must select a course or if the student can leave the requirement blank

Pearson recommends you complete the page entirely to ensure a successful request form. For example, if each student must select a course from the group, choose **Must select one**.

8. Choose **Elective**, **Alternate**, or **Required** from the Request type menu

Use the Request type field to define a general priority for the request. The system schedules required requests first, elective requests second, and alternate requests third. If an elective course cannot be schedule, an alternate takes the elective's place.

9. Enter a sort order number for the placement of the requirement on the request screen

Pearson recommends that you complete the page entirely to ensure a successful request form. For example, enter the sort order number 0 to place the requirement first.

10. Click **Submit**

## Multi-Course Requirements

Use a multi-course requirement when students need to make a number of selections from a course group. You define the number they must select.

1. On the Start Page, click **PowerScheduler**
2. Below Requesting, click **Screen Setup**
3. Click the appropriate grade level from the Requests menu
4. Click **New Multi-Course Requirement**

Multi-Course Requirement	
Name of this requirement	<input type="text" value="9th Grade Semester Electives"/>
Description/Instructions Advises students on how to comply with this requirement	<input type="text" value="Select up to two courses."/>
List of valid courses for this item	<input type="text" value="9th Electives"/>
Number of courses student must select to meet this requirement	Min: <input type="text" value="0"/> Max: <input type="text" value="2"/>
Message to display if the number of courses selected is not correct (leave blank for a generic message)	<input type="text"/>
Request type (alternates will be used if an elective cannot be filled)	<input type="text" value="Elective"/>
Number of requests to generate	<input type="text" value="1"/>
Item sort order (affects display only)	<input type="text" value="2"/> (a number from 0 to 100)
<input type="button" value="Delete"/> <input type="button" value="Submit"/>	

5. Enter a requirement name, description, message to display if the requirement isn't completed correctly, and sort order
6. Choose a valid course group for the requirement
7. Enter the minimum and maximum number of courses the student must select

Pearson recommends you complete the page entirely to ensure a successful request form. For example, if the student doesn't have to select a course, enter 0 in the Min field.

8. Enter a sort order number for the placement of the requirement on the request screen
9. Click **Submit**

## Core Requirements

Use a core requirement to display a set of predefined requests, such as core classes for 9th graders. Students cannot make or change selections and the core requests are added when the request page is submitted. For example, if PE9 is a core requirement, then even handicapped students will receive the request upon submitting the request screen. You will need to manually remove the requests for any student who will not be taking the course.

1. On the Start Page, click **PowerScheduler**
2. Below Requesting, click **Screen Setup**
3. Click the appropriate grade level from the Requests menu
4. Click **New Core Requirement**










Core Requirement	
Requirement Name	<input type="text" value="9th Grade Requirements"/>
Description/Instructions Advises students on how to comply with this requirement	<input type="text" value="Every 9th grader must take the following courses."/>
List of valid courses for this item	<input type="text" value="Grade 9 Required"/>
Number of requests to generate per course	<input type="text" value="1"/>
Item sort order	<input type="text" value="0"/> (a number from 0 to 100)
<input type="button" value="Delete"/> <input type="button" value="Submit"/>	


5. Enter a requirement name and description
6. Choose a valid course group for the requirement
7. Enter a sort order number for the placement of the requirement on the request screen
8. Click **Submit**

## Previewing the Student Course Request Page

As you create all of the requirements for a grade level, preview the request page to determine if you need to make any changes.

1. On the Start Page, click **PowerScheduler**
2. Below Requesting, click **Screen Setup**
3. Click a grade level from the Requests menu
4. Click **Preview Student Registration Screen**

<b>9TH-GRADE CORE REQUIREMENTS</b> All 9th-grade students must take the following courses.	<b>Health 9</b> HE09 - 0.5 credits	<b>Phys Ed 9</b> PE09 - 0.5 credits	 
	<b>Geography</b> SOC1100 - 1 credits		
<b>9TH-GRADE ENGLISH REQUIREMENT</b> You must choose one English course.	Click the edit button to request a course →  		
<b>9TH-GRADE SEMESTER ELECTIVES</b> Choose up to two semester-long elective courses.	Click the edit button to request a course →  		
<b>ALTERNATES FOR SEMESTER ELECTIVES</b> If you would like to choose an alternate to your elective choices, choose from the list below. DO NOT choose the same courses as your Elective choices.	Click the edit button to request a course →  		
Requires between 5 and 7 credit hours.  Requesting 2 credit hours.			



#### 5. Review the request form

Use the Pencil icon to edit the course requests for that requirement. The green check mark confirms a selection or signifies an optional requirement. The red exclamation mark means that the student has not selected a course yet to satisfy that requirement.

#### 6. Navigate back to the Screen Setup to make changes

## Entering Student Course Requests

Use one of three methods for collecting student course requests:

- Enter requests manually for students one at a time
- Mass add requests for students groups
- Use the course request form online

You will learn each method of entering course requests. Remember to activate the request form first.

Students, parents, or administrative staff members enter course requests using the request screens. Students and their parents enter course requests using Parent Access, and administrative staff members enter course requests using the Modify Future Requests student page in PowerSchool or the Requests page in PowerScheduler.

Do not modify requests by selecting a student from the Start Page and accessing the Modify Current Requests student page.

## Activating the Course Request Forms

1. On the Start Page, click **PowerScheduler**
2. Below Requesting, click **Screen Setup**
3. Select the appropriate grade level from the Requests menu
4. Check **This grade may register for classes**
5. Click **Submit**

## Entering Course Requests in PowerScheduler

1. On the Start Page, click **PowerScheduler**
2. Below Resources, click **Students**
3. Search for and select your student
4. Click **Requests > New > Associate**

Hold down the COMMAND key to make multiple selections

18001	Band
ART1000	Intro to Art
ART1100	Drawing and Design
ART2000	Studio Pottery
ART2100	Beginning Pottery
ART2200	Painting
ART3000	Studio Art
ART9	Art
CS1000	Keyboarding
CS1001	Word Processing
CS1002	Computer Applications
CS2000	Programming
CS3000	Computer OS
CS9	Computer
ENG1000	English 1
ENG1100	Journalism
ENG2000	English 2
ENG2100	Speech
ENG2200	Technical English

**Submit**

5. To select multiple courses, click the courses while holding the Command key (Mac) or Control key (PC)
6. Click **Submit**

**Courses**

ENG2000,HE11,LAN1100,MAT2001,PE11,SCI1000,SOC2100

**Associate**

**Submit**

- Click **Submit**

To change the courses in the text box, click **Submit** and repeat steps 4-7.

[Constraints](#) | [Demographics](#) | [Grad Planner](#) | [Grad Progress](#) | [Matrix](#) | [Preference](#) | [Requests](#) | [Schedule](#)

**New**

Number	Course Name	Note	Alt	Code	Priority	Section Type	Alternate 1	Delete
CS1001	Word Processing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	E	0	<input type="text" value=""/>	<b>Associate</b>	<input type="checkbox"/>
CS1002	Computer Applications	<input type="checkbox"/>	<input type="checkbox"/>	E	0	<input type="text" value=""/>	<b>Associate</b>	<input type="checkbox"/>
ENG2000	English 2	<input type="checkbox"/>	<input type="checkbox"/>		0	<input type="text" value=""/>	<b>Associate</b>	<input type="checkbox"/>
LAN1100	Spanish 2	<input type="checkbox"/>	<input type="checkbox"/>		0	<input type="text" value=""/>	<b>Associate</b>	<input type="checkbox"/>
MAT2001	Geometry	<input type="checkbox"/>	<input type="checkbox"/>		0	<input type="text" value=""/>	<b>Associate</b>	<input type="checkbox"/>
PE11	Phvs Ed 11	<input type="checkbox"/>	<input type="checkbox"/>		0	<input type="text" value=""/>	<b>Associate</b>	<input type="checkbox"/>

- Click the Note icon to view prerequisite information

**Course Prerequisite for MAT2001**

Must pass Algebra 1 with a C or better.

**Close**

- Check **Alt** to make the course request an alternate for any elective course that can't be scheduled, and enter an **E** in the Code field
- Enter **E** in the Code field for elective courses, and don't select Alt to denote courses that could be replaced by alternates during the load process

Identifying elective courses is optional, but elective course requests are scheduled after required courses.

11. Define alternate requests further by using the priority field

Priority identifies an alternate course that needs to be scheduled before another alternate course. The higher the number, the lower the priority.

12. Choose an option from the Section Type menu if the course uses section types

For example, Journalism has an Honors section and a regular section. Choose **Honors** so the student won't be scheduled in the regular section of the course.

13. Click **Associate** to select an alternate for a course

If PowerScheduler can't schedule the course, it will attempt to schedule the alternate. Selecting an alternate with this method ensures the alternate course will only replace one specific course.

14. Click **Submit**

## Entering a Course Request for Several Students

1. On the Start Page, click **PowerScheduler**
2. Below Resources, click **Students**
3. Search for and select the students for whom you want to enter the course request, such as the entire 9th grade
4. Click **Functions** > **Mass Add Requests**

Option	Value
Course Number	SCI1010 <input type="button" value="Associate"/>
Section Type	<input type="button" value="v"/>
Request Type	Required <input type="button" value="v"/>
Priority	<input type="text"/>
<input type="button" value="Submit"/>	

5. Click **Associate** to select the course, then enter information in the fields
6. Click **Submit**

After mass adding requests or manually adding requests, perform the Invalid Requests group function. Invalid Requests collects all the requests a selection of students has made for the specified school year, and re-evaluates each request against the course prerequisites and recommends. When you mass add requests or manually add requests, course prerequisites and recommends are not taken into account. Therefore, it is important to perform Invalid Requests and remove any requests that don't meet course requirements.

## Entering Course Requests in the Parent Portal

1. Enter your school's URL for the Parent Portal in the Address field of your web browser
2. Enter your username and password, and click **Sign In**
3. Click **Class Registration**
4. Select your course requests
5. Click **Submit**

## Entering Course Requests in PowerSchool

1. On the Start Page, search for and select a student
2. Click **Request Management > Modify Future Requests**
3. Select the student's course requests
4. Click **Submit**

## Course Prerequisites

You build a request form for the general student body, but sometimes, individual students need to meet certain course requirements. Course requirements, if not met, can stop a student from requesting a course. Course requirements include taking or passing a prerequisite course, requiring a teacher recommendation, or a combination of these requirements. Define course requirements in the course information found in School Setup or District Setup.

When students select a course group on the request screen, they check the class they want to take. However, students cannot check classes if they haven't met the prerequisites. For example, a 10th-grade student wants to take Speech. However, he can't select the course because he hasn't met the English teacher recommendation requirement. The image below shows the Speech class with no check box.

Choose one english class.

<input checked="" type="checkbox"/>	Course Name	Number	Credits	Prerequisite Note	Alerts
<input type="checkbox"/>	Journalism	ENG1100	1		
<input type="checkbox"/>	Speech	ENG2100	1		! Prerequisites have not been met
<input type="checkbox"/>	Technical English	ENG2200	1		! Prerequisites have not been met

<< first < prev 1 next > last >>

! You may select 1 course. You have selected 0 courses.

Cancel Okay

You have some flexibility when using the prerequisites. You can define the prerequisite based on the assumption that the student will complete the course. If the student doesn't complete the prerequisite course, but he made the request for the next course already, the request becomes invalid. Additionally, you can override any prerequisite by navigating to the student pages and clicking **Request Management > Override Prerequisites**. The request pages and PowerScheduler don't contain overridden information or notes.

## Course Request Tools

Once you or the students have entered all requests, use the following request tools to analyze and confirm the success of the request process.

- Course Request Tally Report
- Requests by Course Report
- Requests by Student Report
- Invalid Requests

## Step F: Adjusting the Master Schedule Manually

You may need to make minor changes to the master schedule you copied. For example, you might need to move a course section, or assign it to a different teacher.

1. On the Start Page, click **PowerScheduler**
2. Below Schedule, click **Sections**
3. Click the course for which you want to adjust a section
4. Click the specific section number you need to adjust

Option	Value
Course name	Algebra
Course number	10003A
Term	Semester 1 <input type="button" value="v"/>
	Expression: 1(A)
	A
Schedule	1 <input checked="" type="checkbox"/>
	2 <input type="checkbox"/>
	3 <input type="checkbox"/>
	4 <input type="checkbox"/>
	5 <input type="checkbox"/>
	6 <input type="checkbox"/>
	7 <input type="checkbox"/>
Teacher	Derringer, Malcom B <input type="button" value="v"/>
Room	202 <input type="button" value="Associate"/>
Section number*	1 <input type="button" value="Locked Section"/> <input type="checkbox"/>
Close section at max	<input type="checkbox"/>
Section type	<input type="button" value="v"/>
Grade Level	0

5. Enter or edit information in the Teacher, Period, Schedule, or Room fields, as needed
6. If you are using Teams, make sure that you identify the team on the section
7. Click **Submit**

## Step G: Defining Load Constraints

Restrict the way the system loads students into courses that have been scheduled already. Below is list of the available load constraints.

- Balance Adjustment — pre-load a section with “fake” students
- Student Avoid — keep two students from being scheduled together
- Teacher Avoid — keep a student and a teacher from being scheduled together
- Student Free — specify a period when a student must be free
- Section Link — specify that students enrolled in one section must be enrolled in another section, such as Biology and Biology Lab
- Student Preference — schedule a student in a particular course section

The more constraints you define, the less flexibility you have to load students into your schedule and the less optimal the resulting schedules will be. Therefore, define load constraints after you load students one time. Then, use the fewest number of constraints to accomplish your scheduling goals.

1. On the Start Page, click **PowerScheduler**
2. Below Resources, click **Constraints**
3. Select the type of load constraint you want to define from the Constraints menu, such as Student Avoid
4. Click **New**

Option	Value	
Student 1	<input type="text" value="258"/>	<input type="button" value="Associate"/>
Student 2	<input type="text" value="612"/>	<input type="button" value="Associate"/>

5. Enter information as required by the fields on the constraint page
6. Click **Submit**

## Step H: Loading Students

You are now ready to load students into the master schedule and create student schedules. You can load students several times. For example, assume you load students and realize that you need to define a constraint. Select the students you need to reschedule, and reload those students so that the system recreates their schedules while abiding by the constraint.

Prior to running a load, you need to download the PowerScheduler Engine and install it on the computer you will use to create the schedule. Click **Engine Download**, and select the link to download and install the engine to your computer.

1. On the Start Page, click **PowerScheduler**
2. Below Processing, click **Load**

Validate	
<b>Validate only</b> (Performs only a validation of the scheduling data for loading)	<input type="checkbox"/>
Load	
<b>Load type</b> (Student schedules may be loaded from scratch. Existing schedules may be balanced or students that have already been loaded may be rescheduled)	<input checked="" type="radio"/> Load all students <input type="radio"/> Balance <input type="radio"/> Reschedule the selected 0 students
Close sections at maximum	<input type="checkbox"/>
Use global course substitutes (see Course Preferences)	<input type="checkbox"/>
Use student course substitutes (see Requests)	<input type="checkbox"/>
<b>Execute</b>	

3. Select a Load type:
  - a. Full — The system reschedules all students
  - b. Balance — The system adjusts students' schedules to help improve the balance of students between course sections
  - c. Reschedule — The system reschedules only those students you select before you access the Load page
4. Select the appropriate check boxes to indicate whether you want the system to close sections at maximum, use global course substitutes, or use student course substitutes

Do not select "Close sections at maximum" the first time you load students.

5. Click **Execute**

## Step I: Evaluating the Load

After the system finishes the load, the percentages of students with requests, requests satisfied, and students without conflicts appear on the Scheduling page.

### Viewing the Load Results

1. On the Start Page, click **PowerScheduler** > **Scenario**
2. View the load results for the appropriate scenario
3. Click **(Q)** next to Load
4. Click **View** in the Load Log column for the appropriate load

### Viewing the Load Error Log

1. On the Start Page, click **PowerScheduler**
2. Below Processing, click **(Q)** next to Load
3. Click **View** in the Results Log column

The Results Log [for school name] page alerts you to any problems the system had when loading students into the master schedule. A dashed line appears if the load was successful.

4. Analyze the results of the load

There are three types of messages:

- a. Info — informational messages, such as “Invalid YOG found in the Student file. The students is [x] and the YOG is 0.” These errors do not prevent a successful load.
  - b. Warning — “red flag” messages, such as “The Request file contains an invalid student. The course is [x], the student is [x]. The request was dropped.” These errors do not prevent a successful load.
  - c. Error — validation errors that you must correct in order for the engine to run, such as “The student requests multiple times of the same course, but the course does not allow repeating requests.” These errors prevent a successful load.
5. Fix any errors, and run the load again

You won't see student schedules until you import. When you're satisfied with the percentage of students loaded, click **(Q)** > **Import**. Then, fix any schedule problems, and load again. View the log, and import again until you schedule the majority of your students successfully. For more information on importing, download the user guide on the PowerScheduler load process from PowerSource.

## Viewing Post-Build Reports

1. On the Start Page, click **PowerScheduler**
2. Below Tools, click **Reports**
3. Print the following reports to evaluate student schedules:
  - a. Non-scheduled Course Requests
  - b. Non-scheduled Student Requests
  - c. Student Schedule List
  - d. Alternate Request
  - e. Under-scheduled Students
  - f. Schedule Course Enrollment
4. Print the following reports to evaluate the master schedule:
  - a. Master Schedule
  - b. Master Schedule (PDF)
  - c. Master Schedule List
  - d. Room Schedule
  - e. Room Utilization

## Step J: Exploring Post-Load Options

After you load students into the master schedule, you can do the following:

- Accept the load, and make manual adjustments to student schedules
- Resolve student conflicts by loading student schedules again, and selecting the substitute check boxes on the Load page
- Adjust student course requests manually, and load the students again
- Select and reload only a specific group of students after selecting the substitute check boxes on the Load page or adjusting student course requests manually

### Adjusting Student Schedules Manually

Complete the following steps to adjust student schedules on an individual basis.

1. On the Start Page, click **PowerScheduler**
2. Below Resources, click **Students**
3. Search for and select a student or a group of students
4. Choose **Schedule** from the menu at the top of the student list
5. Click a student's name
6. Use the Enroll menu to enroll the student in a class
7. Use the Drop menu to drop a class from the student's schedule

### Adjusting Several Student Schedules Manually

1. On the Start Page, click **PowerScheduler**
2. Below Resources, click **Students**
3. Search for the students you want to enroll in the same course
4. Click **Functions** > **Schedule Mass Enroll**

Mass enroll the selected students into which class?

Select a teacher...   (course.section)

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

Enrollment date:

5. Do one of the following to enroll the selected students in a section:
  - a. Choose a teacher, period, day, and term from the menus
  - b. Enter the course and section number in the course.section format, such as 1025.6
6. Click **Submit**

## Reloading a Specific Group of Students

1. On the Start Page, search for and select the group of students you want to reload
2. Click **PowerScheduler** on the main menu
3. Below Processing, click **Load**
4. Select the load type "Reschedule the selected [xx] students"

The system reschedules only those students you selected on the Start Page.

5. Select the appropriate check boxes to indicate if you want the system to close sections at maximum, use global course substitutes, or use student course substitutes
6. Click **Execute**
7. Click **Import** to import the schedules into your PowerSchool database

