**PowerScheduler Checklist: Load Only**

**Load Only:** For schools that want an automated process to schedule students into classes. The process loads students into the master schedule, i.e., assigns sections to students so that they have schedules for the upcoming school year. These schools usually create the master schedule manually, or by copying the master schedule from a previous year.

**Load Overview**

The PowerScheduler Load process contains the following phases.  Click the links below for additional details on the required and recommended steps within each phase.

**♦** - Indicates required elements

**Create Years and Terms on the live side**

Before you begin PowerSchool support (central office) must create your years and terms on the live side.

**Prepare: Create Scenario and Copy Master Schedule**

**Note:**Please contact your central office PS support rep for help getting started. Step 1 is completed at the district level. Perform the following functions in the order listed.

|  |  | **Process** | **Description** | **Resources** |
| --- | --- | --- | --- | --- |
| 1 | ♦ | Enable Access | Enable access to PowerScheduler for specific security groups. | [7359](https://support.powerschool.com/d/7359) |
| 2 | ♦ | Create Scenario: Auto. Scheduler Setup | Create your scheduling scenario at PowerScheduler > Auto. Scheduler Setup. The scheduling scenario is the basic framework for your schedule before sections and students are added. The scenario includes the terms, periods, days, and courses for the schedule. It is strongly recommended to run the function at every school in the District, regardless of whether the school uses PowerScheduler. | [9892](https://support.powerschool.com/d/9892) |
| 3 | ♦ | Set Schedule Year | Set the Schedule Year to associate the scenario with the Years & Terms created using the Auto. Scheduler Setup. The function is located at PowerScheduler > Functions > Set Schedule Year. | [7297](https://support.powerschool.com/d/7297) |
| 4 | ♦ | Copy Master Schedule | Copy the schedule from a previous school year at PowerScheduler > Functions > Copy Master Schedule. This function copies sections into the schedule, including all associated settings, such as expression, room, teacher, term, etc. Make sure to run any Auto Generate functions after copying the Master Schedule. | [8270](https://support.powerschool.com/d/8270) Copy Master Schedule  [6516](https://support.powerschool.com/d/6516) Auto Generate Functions |
| 5 | ♦ | Download Scheduling Engine | Download the latest version of the scheduling engine by going to PowerScheduler > Tools > Engine Download. | [8561](https://support.powerschool.com/dir/8651) |

**Setup: Courses, Rooms, Build Constraints**

|  |  | **Process** | **Description** | **Resources** |
| --- | --- | --- | --- | --- |
|  |  | Add New Courses and Sections | Add new courses to PowerSchool at Start Page > District > Courses. New courses must be associated with the course catalog on the live-side and then associated to the catalog in PowerScheduler. | [10976](https://support.powerschool.com/d/10976)  [8923](https://support.powerschool.com/d/8923) Course Relationships |
|  |  | Load Constraints | Load constraints restrict the actual loading of students into the master schedule. To set up load constraints, navigate to PowerScheduler > Constraints. | PowerSchool Online Help |
|  | ♦ | Create Rooms | Rooms are associated with sections during the Copy Master Schedule process, however they may still need to be created for the current scenario. If rooms are not valid, sections will not display in the master schedule. **Mass create** Rooms at PowerScheduler > Functions > Auto Generate Rooms. **Manually create** Rooms at PowerScheduler > Rooms > New. | PowerSchool Online Help |

**Setup: Students and Teachers**

**Note:** Set up courses and student scheduling preferences before entering student course requests.

|  |  | **Process** | **Description** | **Resources** |
| --- | --- | --- | --- | --- |
|  | ♦ | Set Teacher Scheduling Preferences | The mandatory scheduling fields for teachers are Schedule This Teacher and Maximum Consecutive Periods.  **Note**: This is necessary to verify and set for teacher. If a teacher is not checked to be scheduled, the load validation or load displays the following error message:  **Error: The Master file contains an invalid teacher**. | [10982](https://support.powerschool.com/d/10982) |
|  | ♦ | Set Student Scheduling Preferences | The mandatory student scheduling preferences are Next School, Next Year Grade, and Schedule This Student. Use the Functions tool in PowerScheduler to set these and more. | [10982](https://support.powerschool.com/d/10982) |
|  | ♦ | Enter Student Course Requests | **Important:** It is necessary to set up new courses and student scheduling preferences before entering student course requests.  Student course requests must be entered before running a Load.  Students can enter their course requests via the PowerSchool Public portal using a **course request screen**. | [6276](https://support.powerschool.com/d/6276) Enter Requests  [11005](https://support.powerschool.com/d/11005) Student Request Screens  [63490](https://support.powerschool.com/d/63490) User Guide  [6604](https://support.powerschool.com/d/6604) Import Requests |

**Load Students**

**Note:** Perform the following processes in the order listed.

|  |  | **Process** | **Description** | **Resources** |
| --- | --- | --- | --- | --- |
| 1 | ♦ | Review Master Schedule | Review the Master Schedule by navigating to PowerScheduler > Master Schedule and make final manual modifications. | N/A |
| 2 | ♦ | Load Validation | Run a load validation after the schedule is complete and students have entered requests. Navigate to PowerScheduler > Load (Q) (click **Load**), select the checkbox for **Validate only**, and click **Execute**. The PowerScheduler engine will run a load without actually creating any student schedules. | PowerSchool Online Help |
| 3 | ♦ | Fix Load Errors | Review and fix Load errors or warnings in the Load Results Log at PowerScheduler > Load **(Q)**. | [10981](https://support.powerschool.com/d/10981) |
| 4 | ♦ | Load | Run a load by navigating to PowerScheduler > Load (Q) (click **Load**). | PowerSchool Online Help |
| 5 | ♦ | Import Schedules | Import load results to view student schedules in PowerScheduler. Navigate to PowerScheduler > Load (Q) (click **(Q)**), and click **Import** to transfer the data into PowerScheduler. **Important:** Each time a new load is run and imported, all manual changes to student schedules are lost. | PowerSchool Online Help |

**Review Post-Load Schedule**

|  |  | **Process** | **Description** | **Resources** |
| --- | --- | --- | --- | --- |
|  |  | Run Load Reports | PowerScheduler includes a group of reports designed for analyzing data after running a Load. To access the reports, navigate to PowerScheduler > Reports > Post-Build Reports. | N/A |
|  |  | Re-Load Entire Schedule | Run another Load to create new student schedules.  **Important:** Each time a new load is run and imported, all manual changes to student schedules are lost. | PowerSchool Online Help |
|  |  | Reschedule Specific Students | In order to run a Load for a specific group of students, navigate to PowerScheduler > Students, and create a selection. Next, navigate to PowerScheduler > Load (Q) (click **Load**). Select the **Reschedule the selected x students** option. | PowerSchool Online Help |
|  |  | Make Manual Edits | Make final manual modifications to perfect the schedule. | N/A |

**Commit Schedule**

**Note:** Complete all scheduling processes before committing the schedule.

|  |  | **Process** | **Description** | **Resources** |
| --- | --- | --- | --- | --- |
| 1 | ♦ | Back-up Data | Verify that there is a current backup of your PowerSchool data. |  |
| 2 | ♦ | Commit the Schedule | Commit the schedule from PowerScheduler to the live-side. Perform this action **after** the schedule is complete and school is out of session, but **before** the End-of-Year (EOY) process has been run. Ensure that the year term has been created on the live side before committing your schedule.  To commit your schedule, navigate to PowerScheduler > Commit. It is possible to replace student schedules, sections, or both, on the live side. | [9687](https://support.powerschool.com/d/9687) After EOY  [6597](https://support.powerschool.com/d/6597) Commit Error |